

**Place Branding in a Globalizing Middle East:
New Cities in Saudi Arabia**

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May 2017
Submitted in partial fulfilment of the requirements
of the award of Doctor of Philosophy

Abstract

The study explores the development and branding of a new city in Saudi Arabia. As place branding theory is geared towards existing places, it does not take into account newly developed cities. Here place branding takes on a new significance. How do we develop a brand for a city that does not yet exist? Who are the actors involved and how do they influence the process? The study uses thematic discourse analysis to investigate the interplay between actors and place brand development in King Abdullah Economic City (KAEC) in Saudi Arabia for two separate branding scenarios; holistic and investment. It is further structured through the theoretical lens of actor-network theory (ANT) to take advantage of relational aspects that can lend insight on how a brand is created and enacted. As the research focuses on the process of creating meanings and concepts to build a place brand, an exploratory, inductive approach was used as a basis for the methodology. This revolved around using the KAEC project as both a critical and representative case study to build theory in this specific type of urban development and location as it was the only new city in the country in a stage that showed both the development of urban fabric and place brand. Additionally, the study utilized a mixed-method approach that used multiple sources of data including the analysis of visual representations, public media, semi-structured qualitative interviews, and a focus group.

The findings have highlighted the importance of place branding in the development of new cities and that the process is extremely actor driven. It also places focus on the challenges involved in place branding such as politics, special interest groups, management, stakeholder involvement, and authenticity. To properly develop and brand a new city, effort must be placed on aligning the development to all place branding goals. While economic goals are important in financing physical infrastructure, a focus on people is imperative to success, making social development equally important as physical development in new cities and their branding. In this context, place branding is not separate from the development process as a strong reciprocal relationship has been shown to exist between them. The study also emphasises the importance of branding practices in the beginning stages of new city development. It further suggests that the message itself, the conceptual place brand, can represent a socially constructed idea or belief that can shape perceptions about the project before physical form is developed and can also affect this form as it is being planned and created.

Dedication

To my Parents

Acknowledgments

I would like to thank my supervisors Ramin Keivani and Steve Ward for their constant advice, support, and encouragement during this research.

I also want to thank all my friends and family who have stood by me, especially Avar Almukhtar, Pam Sitko, Leo Graves, Laura Novo de Azevedo, and Dimitrios Moutaftsis.

Finally, a sincere nod to my close friends Ned Farr, Benoit Perino, and Mohammed Habis. Couldn't have done it without you guys!

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List of Abbreviations

ANT	Actor-network Theory
ARAMCO	Saudi American Oil Company
CAS	Complex Adaptive Systems
ECA	The Economic Cities Authority
EEC	EMAAR the Economic City Company
EPZ	Export Processing Zones
FDI	Foreign Direct Investment
FEZ	Free Economic Zone
GCC	Gulf Corporation Council
IDP	Initial Development Period
IEU	Investment End Users
IPO	Initial Public Offering
JEC	Jizan Economic City
KAEC	King Abdullah Economic City
KAFD	King Abdullah Financial District
KAU	King Abdul-Aziz University
KAUST	King Abdullah University for Science and Technology
LP	Launch Period
MENA	Middle East North Africa
NB	Nation Brand
OPP	Obligatory Passage Point
PPP	Public-Private Partnerships
PR	Public Relations
RCJY	Royal Commission of Jubail and Yanbu
REU	Resident End Users
RP	Redevelopment Period
RQ	Research Questions
SAGIA	The Saudi Arabian General Investment Authority
SCTH	Saudi Commission for Tourism and National Heritage
SEZ	Special Economic Zones
SIG	Special Interest Groups
TDT	Topic Detection and Tracking
UAE	United Arab Emirates
UDP	Urban Development Projects
WTO	World Trade Organization

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Chapter 1 Introduction

On June 11, 2008, the King Abdullah Economic City (KAEC) project was launched with much fanfare in Saudi Arabia, heralding in a new era of economic and social development for the Kingdom's growing population and global aspirations. The highlight of the launch was a presentation to King Abdullah, the namesake of the city, where a live hologram of a presenter interacted with the audience. Developed by Cisco, the 'On Stage TelePresence Experience' technology was cutting edge at the time and was more reminiscent of science fiction movies than a country that only introduced public internet nine years earlier. The announcement of the city's development was publicly received with a mix of hope and scepticism. Pegged to be the next Dubai, the project attracted much international interest and soon after inspired an American novel and a film released in 2016. In both, the protagonist had a preconceived perception of a high-tech city of glass rising from the barren desert. A belief that the project was 'full steam ahead' while locals saw nothing there (Eggers, 2012). These conflicting perceptions of a place mirrored my own experiences with the KAEC project and the views of both local and international professionals and laymen I interacted with while working in Saudi Arabia. It reminded me of how people perceived America during the colonial era or the later drive west on the wagon trails across the plains to the land of opportunity (Gold and Ward, 1994).

Having a background in the built environment and real estate marketing, the challenge of building a competitive brand identity for a city that doesn't exist piqued my interest. Has it been studied before? What would such branding involve? What would drive its success or failure? Questions that inspired me to pursue a research degree on the development and branding of new cities. As more countries embark on similar new city initiatives, understanding how place branding can be used in the absence of built form or population becomes imperative, making the need for such research important, not only from a financial and economic standpoint, but also from a social-cultural perspective.

1.1 Research Problem

Global competitiveness revolves around the ability to attract investment, business, residents, and visitors (Ward, 1998; Short and Kim, 1999; Kotler, 2002). To reach these goals, urban areas have turned to place branding strategies to develop strong competitive identities (Liouris and Deffner, 2005). While European and North American countries have successfully used place branding to enhance their cities and regions (Berg and Björner, 2014), different challenges exist when implementing branding strategies in the developing world (Wen and Sui, 2014; Govers and Go, 2009). Place branding practices are designed to work in countries that encourage public involvement in the planning and development process (Kavaratzis et al., 2015). This is complicated in the developing world by top-down government structures, fragmented cooperation between government and private entities, and the lack of stakeholder inclusion (Björner, 2014; Wei et al., 2006). Although some of these factors can be considered typical place branding issues, they are felt more strongly in cities that lack a historic identity, urban form, or communities. Instead they include a sense of place that is created by different actors to convey a specific purpose (Löfgren, 2014; Govers, 2012).

Additionally, many countries in the developing world have yet to grasp the holistic aspects of place branding and instead concentrate on ‘place marketing’ strategies that focus on short term goals such as the development and sale of specific urban elements (Fan, 2014). As Wen and Sui (2014:128) state “city branding should be seen as an entire system that needs to be maintained long-term, both domestically and internationally, with the same message”. The goal of place branding is to build a symbolic, comprehensive, and competitive image for a city, including its unique features and people, and subsequently communicate this image both locally and globally. This type of integrated brand communication is a long-term strategy that needs to reflect a city’s growth and development. However, many place branding strategies do not take into account the development of identity for planned cities that are without an existing urban fabric or population. Therefore, identifying critical place-branding success factors for new cities constitute a gap in the existing literature and can be seen as potential contributions to new knowledge.

Saudi Arabia has been slow to develop into a major global player due to defensive reactions to the socio-cultural, religious, and political threats of globalization (Looney, 2005; Henry, 2003). However, declining oil reserves and a growing young population has forced the country to re-evaluate its stance and make serious efforts at diversifying its economy while addressing existing socio-cultural and religious issues (Jordan, 2011). This strategy includes the development of four new economic cities, a mix between special economic zones and megaprojects, spearheaded by the King Abdullah Economic City (KAEC) on the Red Sea (SAGIA, 2014). The key driver behind this research is to understand how developers and public partners use place branding to create identity for new cities being developed that wish to compete regionally and internationally (Kotler, 2002; Ashworth and Voogd, 1990). This involves understanding the political, economic, geographic, socio-cultural, and religious factors that are involved in defining place brand identity in Saudi Arabia.

1.2 Research Aims and Objectives

The overall aim of the study is to identify and assess key indicators and critical place-branding elements that create a competitive place brand for new cities in Saudi Arabia from economic, political, and socio-cultural perspectives. It also seeks to identify more generic implications of place branding on new cities. This was achieved by addressing the following objectives:

1. To develop a framework that conceptualizes the place branding process through the theoretical lens of actor-network theory.
2. To identify critical elements of place branding in Saudi Arabia's new cities based on a case study approach.
3. To contribute on the broader implications of new city place branding, particularly in the context of developing countries.

1.3 Research Questions

1. What is the relationship between the development of new cities and place branding theory?
2. How does this relationship manifest in Saudi Arabia's new city initiatives?
3. What are the critical elements that must be taken into account during the process of branding new cities in Saudi Arabia?
4. How do different actors influence the development of place branding in this context?
5. How do we address the temporal dimension of branding in new cities?
6. What role do concepts and ideas play in the process of branding new cities in Saudi Arabia?

1.4 Research Strategy

The research is grounded in three different areas of knowledge which were used to develop a conceptual framework. They are:

1. Globalization, specifically how it relates to cities, competition, and the political, economic, and socio-cultural environment in the Middle East.
2. Place branding, to understand the theories involved in developing identity and the existing frameworks that identify, develop, and measure the value of a place brand in cities.
3. Theories of image representation and analysis through ideology and discourse analysis.

The research seeks to understand how different representations and perceptions of place in new cities are developed and perceived across different stakeholder groups in Saudi Arabia. As the situation is socially, religiously and politically unique, different human and non-human actors need to be linked together to understand the relational ties within the network that develops and controls place branding in new cities (Law, 2009; Latour, 2005). Saudi Arabia's new cities embody this relationship structure more so than other places as they are limited in their spatial components, being in the beginning phases of development. They are new cities that have yet to develop any substantial urban form or

fabric but are being promoted through place branding to exemplify a certain identity. As these cities are a part of a larger strategic vision targeting national growth and diversification, their objectives are more complex than a typical development project. The decision to use the actor-network theory (ANT), a material-semiotic method, reflects this unique situation, which cannot be simplified by just exploring economic, social, or political motives alone but needs to be investigated by looking at a combination of different actors and networks and how they interact to develop identity for these cities.

A conceptual framework linking development, place branding, and actor-network theory was used to identify a mixed-method methodology for investigating the creation of the KAEC brand during the first ten years of the project. The goal was to identify critical elements of place branding on two targeted segments; investors and local residents. Because KAEC is the first development of its kind in the country, it was considered a unique and representative case that can be used to develop theory in this specific type of urban development and location (Yin, 2014). An analysis of existing promotional representations and a public media search were used to develop forty (40) semi-structured interviews targeting different key stakeholders. The study focused on three organizations: ‘The Saudi Arabian General Investment Authority’ (SAGIA), ‘The Economic Cities Authority’ (ECA), and the private master-developer for the city, ‘EMAAR the Economic City Company’ (EEC). Further data was collected from other informed stakeholders such as academics, businessmen, investors, contractors, and key community figures to explore their perception of the brand. The data was then analysed through discourse analysis to highlight main themes in the creation, development, and use of the KAEC brand.

The study further focused on three different points in time based on key shifts in branding strategy identified in the media and through initial interviews with government and EEC employees. They are the launch of the city in 2005, the government bailout in 2010, and post bailout strategies being used in 2015. Focus was then shifted to the actors identified in the analysis to explore their influence on the development of the KAEC brand. This was achieved by tracing the different realities being projected by each actor from the perspective of actor-network theory in an attempt to provide insights on how the KAEC brand was enacted over time. Due to its unique development timeline, the KAEC case was considered an accelerated lab experiment on the process of place branding and was able to contribute insights on the study of branding in new cities.

1.5 Thesis Structure

The thesis is organised into ten chapters which fulfil the aims and objectives set out in this research. Each chapter will be briefly outlined in the following sections:

Chapter 1: Introduction

The chapter explores the motivation behind the research and then outlines the research problem that is being addressed, namely how developers and public partners use place branding to create brand identity for new cities competing regionally and internationally. It then goes on to outline the research questions, aims and objectives, and finally the research strategy that was used for the study.

Chapter 2: Globalization and Urban Development in the Middle East

The chapter looks at the forces that drive globalization by focusing on the links between the theory, competition, and urban development. It further highlights various major issues that relate to globalization in the Middle East and in Saudi Arabia specifically. It goes on to explore how new cities in the country are being developed and have performed to identify the challenges, issues, and problems that arise during this process. It further highlights the link between development and branding in this specific context.

Chapter 3: Place Branding

The chapter explores the history of place branding and the theories that identify, develop, and measure the value of a place brand in cities. It further highlights the limitations of such theories in developing strategies for new cities that do not include an existing urban or social fabric in the context of the developing world. It then goes on to explore the development and use of place branding in the context of the Middle East and Saudi Arabia.

Chapter 4: Conceptual Framework

The chapter identifies the key concepts used in this research with the goal of understanding the processes involved in the branding of new cities and what influences them. It further explores the interactions between stakeholders and new cities

development. The conceptualization process links together the two main areas of knowledge, globalization and place branding. It then identifies the socio-cultural challenges that face the process in the context of the Middle East and Saudi Arabia and what mechanisms have been put in place to respond to these challenges through key actors over time. The goal was to develop a theoretical framework for analysing place branding in the context of Saudi Arabia's new cities.

Chapter 5: Research Methodology

The conceptual framework developed in the previous chapter was used to develop a mixed-method methodology to identify critical elements of place branding in Saudi Arabia's new cities. It first looks at the scientific orientation of the study, outlining the ontological, epistemological, and methodological assumptions used in this research. It then goes on to discuss the adapted research strategy such as the identification of a representative case study (the King Abdullah Economic City project, KAEC) and the methods that were used to collect, interpret, and analyse the data. It also summarises the procedures used in the collection of promotional representations and other media as well as the process of testing and validation. Finally, it outlines the ethical considerations put into place for the study.

Chapter 6: Case Study and Pilot

The chapter explores the KAEC case in more depth, setting the foundation for its use in the study by identifying key aspects of the city's development, management, and branding processes in preparation for data collection and analysis. This was done through nine (9) semi-structured interviews with government and private partners involved in the development of the new city.

Chapter 7: Image and Media Analysis

The chapter outlines the image and public media analysis process. The images collected from KAEC were analysed using a visual-semiotic approach to interpret the different messages, key themes, and concepts embedded in the promotional elements. The research then linked these messages to existing place branding elements identified in the literature and different actors involved in the process. From a media perspective, an archival search and analysis of public print and social media was undertaken. The data collected by both

methods and their analysis was used to gauge KAEC brand awareness and levels of infiltration into local society and resulted in a list of findings to be used to inform the data collection in the next chapter and the subsequent findings chapter.

Chapter 8: Data Collection and Analysis

To explore the process of place branding in KAEC from the perspective of different actors, this chapter used the theoretical lens of actor-network theory (ANT) to trace the transient enactment of the KAEC brand as urban form develops in the project. It first focused on the different human and non-human actors and their associated power relations by studying the development of both a holistic and investment brand for the city project. From there it explored how the brands have been developed through a Post-ANT concept of enactment and was informed by the use of forty qualitative semi-structured interviews with different actors.

Chapter 9: Research Findings and Testing

The chapter consolidates the findings identified in the previous two chapters into themes based on the research questions and then explores the theoretical implications of each group to build insights on the development and branding process in the specific context of Saudi Arabia. The chapter then outlines the testing process of these findings using a focus group. Finally, it reviews and adjusts the conceptual framework developed in chapter 4 to better reflect the nuances drawn from the data analysis, findings, and testing.

Chapter 10: Conclusions

The chapter first explores how the research has addressed the aims and objectives put forth in its initial conception. It then goes on to identify the key findings and how they contribute to new knowledge on both a theoretical and practical level. Subsequently, it explores the methodological strengths and limitations of the study and highlights some of the challenges faced during the process. It then concludes with recommendations for future research and provides a final concluding note on the overall process.

The thesis will then end with a list of references and a number of appendices that support the study. The ten chapters outlined above can be summarised in the following figure:

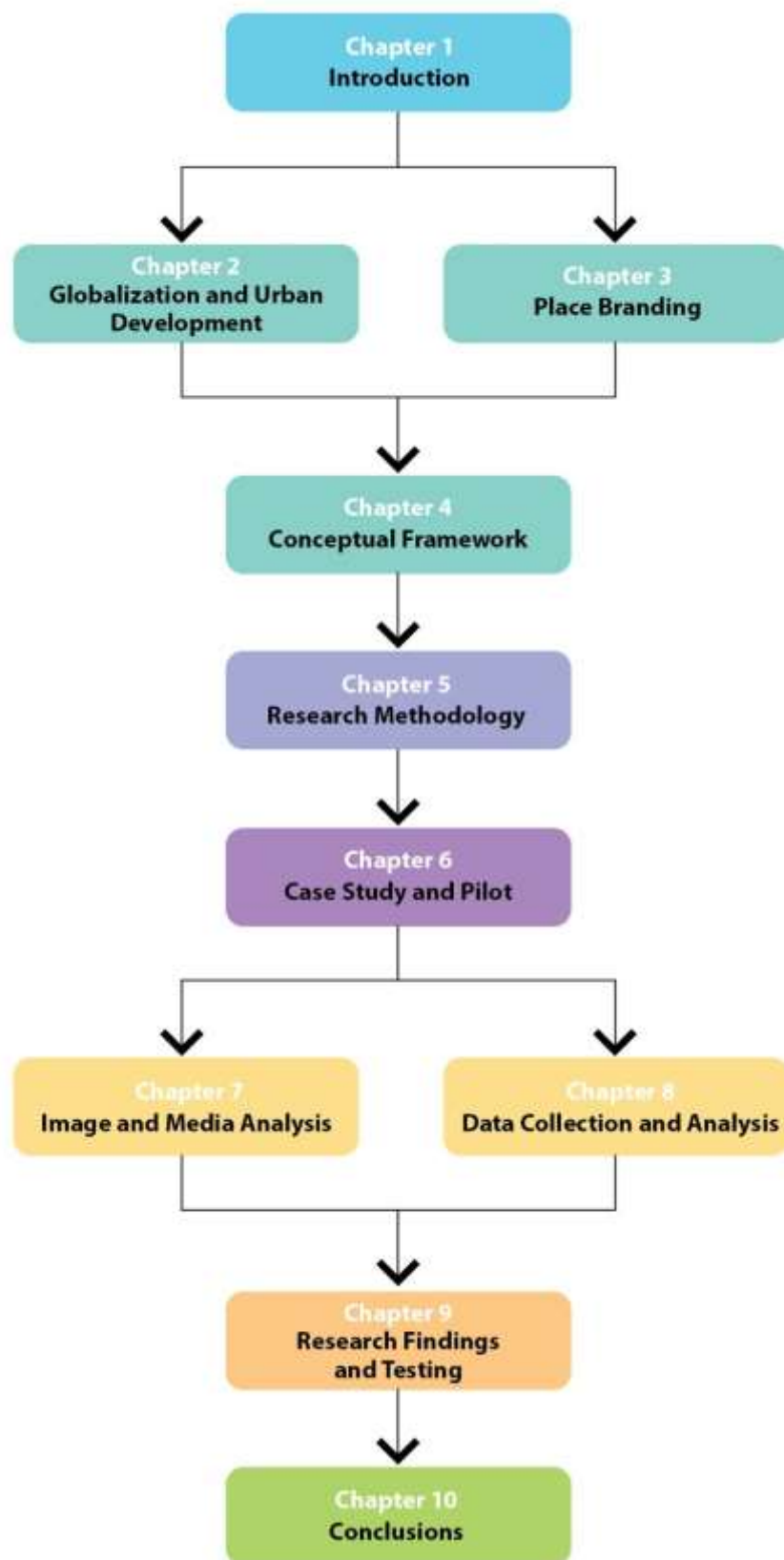


Figure 1-1 Thesis Chapter Structure

1.6 Conclusion

This chapter has introduced the research problem and found that developing a framework for their study of place branding in new cities constitutes a gap in the existing literature and can be seen as a potential contribution to knowledge. Therefore, the overall aim of the study was to identify and assess critical place branding elements that create a competitive place brand for new cities in Saudi Arabia from economic, political, and socio-cultural perspectives. The following chapter provides an in-depth look at globalization and its link to the development of new cities in Saudi Arabia as a precursor to exploring place branding in the country.

Chapter 2 Globalization and Urban Development in the Middle East

The world as we know it is experiencing unprecedented change that is redefining the social, physical, and economic characteristics of our lives. But change isn't a new phenomenon. Growth and evolution have always been important elements in human progress and our economic prosperity (Potter et al., 2008). Taking this a step further, most planning is influenced by development theories and ideologies that reflect the way socio-economic development is perceived (Henderson, 1991). On a global level, development can be seen to shape the way nations grow and interact with each other. In essence it is a collection of theories on how desirable change in society is best achieved. Potter (2008), in the 'Geographies of Development', looks deeper in to the changes in development theory over the years and focuses on the link between globalization and development. Pieterse (2010:15) states that "Globalization is a major vortex of change in the development arena". Potter (2008) expands on this chain of thought and explores the importance of globalization and how it could 'eclipse' other development studies. Here the distinction is clear. Potter looks at globalization as a new phenomenon with links to existing development studies. Looking at the possible historical, albeit simpler, manifestations of globalization throughout history, it is even possible to reverse this viewpoint and see development stemming from globalization. It is possible to go further and perceive the stage of development we have presently reached, typically referred to as globalization, as a large leap in the existing globalization process and not a replacement phenomenon. The next section explores this concept further in an attempt to shed light on the relationships between globalization and urban development and its ramifications on developing countries such as those in the Middle East.

2.1 Globalization Theories

Globalization is a phenomenon that has been bringing the world closer together through the exchange of goods, information, knowledge and culture (Pizarro et al., 2003). Unprecedented advancements in technology, transportation, and production since the second world war have increased the speed and complexity of global interconnectivity (Soubotina and Sheram, 2000). While it has been defined in various ways over the years, globalization generally involves economic integration through the transfer of policies

across borders and the transmission of knowledge. The Organization for Economic Cooperation and Development (Bonturi and Fukasaku, 1993:146) defines globalization as a phenomenon of “increasing interdependence of markets and production in different countries through trade in goods and services, cross-border flows of capital, and exchanges of technology”. The International Monetary Fund (IMF, 1997:3) goes into more detail by stressing the economic connections between Nation States but clearly alludes to the strong link to technology. It states that globalization is “the rapid integration of economies worldwide through trade, financial flows, technology spill overs, information networks, and cross-cultural currents”. The World Bank’s definition of globalization also uses similar wording but expands on the definition by including people and ideas, in essence, culture. It states that globalization is “the growing interdependence of countries resulting from the increasing integration of trade, finance, people, and ideas in one global marketplace” (Soubotina and Sheram, 2000:66). The main elements of this interdependence and integration according to the World Bank have been international trade and cross-border investment flows, which is again very similar to other economically focused definitions.

In essence, it is the changing of global dynamics of economic integration and interconnectivity (Castells, 2000; Bonturi and Fukasaku, 1993). This movement of goods, services, and capital alludes to a more complex economic, socio-cultural, technological, and environmental interdependence among people around the world (Nester, 2010). While this new degree of interconnectivity has created new opportunities and benefits, the increased interdependence that has accompanied these movements has left countries more susceptible to external influences and economic insecurity. Development and change in one region can have strong repercussions on the security and livelihoods of people around the world making globalization a complex and often imbalanced process (Turner and Holton, 2015; Potter et al., 2008; McGrew, 2000). This is especially evident in weaker economies, leading to perceptions of inequality, powerlessness, and social and economic insecurity (Soubotina and Sheram, 2000; McGrew, 2000). But it is this unevenness, this contradictory, often competitive nature that makes globalization what it is. Connectivity, integration, and the aforementioned interdependency grow out of the development of networks, bonds and relationships, which take time to properly develop and become productive. Castells (2000) describes this network development process through the concept of ‘space of flows’ explaining how the world is linked and is being

transformed by the movement and connectivity structures mentioned above and thus limiting territorial contiguity. He goes further in 2003 by focusing on importance of cultural, religious, and national identities as strong components in networks and social movements, highlighting the importance of the social dimension and how the resulting concepts and ideas factor into globalization (Castells, 2003). This strong social and cultural link was explored in detail by Robertson (1992) through a focus on a cultural approach to globalization that explores participation in a more interconnected world. Clearly socio-cultural elements have become one of the three main components of globalization alongside economic and politics (Crane, 2011) and refer to the movement of ideas, meanings, and values that increase and strengthen social relations (James, 2008), in essence considering individual cultures as a part of a larger holistic entity that transcends an individual place (Hannerz, 1992).

Historically we see many comparable, albeit simpler, connectivity structures that have grown out of trade patterns, production specializations, cultural exchanges, as well as through war and conquest (Willis, 2011; Rist, 2009). These structures parallel what we see today in modern globalization, but without the unprecedented connectivity that is defining the world (Castells, 2000). Looking further into the future, one can logically assume that the issues and problems arising out of today's globalization patterns of regulation and regionalization could just be another step in reaching a global equilibrium in power and economic security (McGrew, 2000). Because of this interconnectivity, many current problems can no longer be considered within the national perspective and need to be studied at an international, or global level (Ohmae, 1990). There are two main reasons for this direction of thought. The first deals with the changes in the economic structure of production that have minimized the importance of the 'Nation State' as described by Ohmae (1995) in 'The End of the Nation State'. The second reason for this shift to the global level is the technological and geographic change in mass media leading to many social and cultural processes to surpass national borders (Kelly, 1999). In this context, culture is becoming unassociated with place, and the existence of a global market means that economics dictate global relationships and cultures (ibid). These factors are integrated through the movement of information described in Castells' theory of flows in his book 'the network society' (2000).

From an economic perspective, change in technology and the reduction of government constraints on trade creates multinational networks of production, trade, and finance (Ohmae, 1990). They also result in improved quality of products and faster service leading to a more transnational level of economic activity (Sassen, 1999). There has also been a critical change in the nature and organization of activity from trade in raw materials and manufactured goods to flows of capital, services, and information within and between transnational corporations (Castells, 2000). Taken further, some authors look at economic aspects of globalization as a reflection of capitalism on a different level of development. As Davidson and Harris ask, “Is globalization a mature capitalism that has outgrown its national adolescence into a unifying world system with universal commodification?” (2005:82). Harris (1999) goes on to highlight the link between the present technological revolution and the expansion of capital as a new stage of development. Here the link between economic and political globalization becomes strongly evident as a new global system, where political territories become of little relevance, is starting to appear (McGrew, 2000; Ohmae, 1990). Ohmae (1995) goes as far as suggesting that the state has ceased to function as an effective economic entity and that the future lies with regional economies, something that Nigel Harris also supports when exploring cities and structural adjustment (Harris and Fabricius, 2005). Harris (1999) takes a different approach and sees markets and the policies of ‘Nation States’ being determined by the global economy and the flow of capital through the use of technology that has allowed capital to escape state control (ibid). Not only does technology affect the movement of capital, it also affects where production is carried out, and how and where products are sold, how wealth is accumulated, and finally to where it is controlled, linking economics and politics to space and location. In essence creating a network of command and control centers around the world that have started to replace political capitals in their power and influence on an economic level (Sassen, 2001).

On the opposing side, many authors feel that this characterization is unfounded and find that global markets are socially regulated by Nation States that have adapted to the new global economic climate (Yeung, 1998). Here the State continues to reinforce the role of ‘territoriality’ in global economic development or at least continues to exercise influence over global economic transformations (Sassen, 2001). Ultimately they see the State’s position as relevant because of its power to set policies that protect, encourage, and enhance local economic growth (Yeung, 1998). While looking at the phenomenon from

opposite sides, it is hard not to see the overlap in theory. Where one sees the policies of a Nation State to be determined by global markets, the other side sees Nation States adapting to global economic realities. Either way, these viewpoints attempt to explain globalization from an economic and political standpoint alone. The limitation in this line of thought is that it does not seem to directly associate the spread of free trade with other defining elements such as social and culture influences. It also disregards its repercussions on different economies and nations.

While the above theories give an idea of the prevalent thought on Globalization, McGrew (2000) breaks down the main positions on globalization and mirrors many other authors in the field who have tried to categorize the different perspectives. These positions include a purely globalist viewpoint that looks at the main social, political and economic transformations taking place on a global scale (El-Ojeili and Hayden, 2006; McGrew, 2000). The proponents of this position such as Castells (2000) and Graham and Marvin (2001) see the developing interconnectivity as being the start of a new period of globalism as the “powers of new information technologies support the complex restructuring of urban forms, lifestyles and landscapes” (ibid:14). From a neoliberal viewpoint, globalization is perceived as the global spread of market logic, liberalism, and democracy while critics see it as a new form of western imperialism (McGrew, 2000; Peck and Tickell, 2002).

From another perspective, the transformationalist position sees the phenomenon as something completely new and looks at it from a historic and socio-cultural viewpoint, as well as economic one, while not disregarding the unevenness of its spread and affects over different regions of the world (El-Ojeili and Hayden, 2006; McGrew, 2000). Standing alone, none of these outlooks seem to properly reflect the full complexity of the globalization processes. While many include important elements that have merit, the transformationalist position is a more complex explanation than the other viewpoints, not because of its explanation of the spread of globalization, but because it looks at globalization as a complex phenomenon with many facets, both positive and negative. In essence it can encompass economic elements while also dealing with the negative results of the phenomenon from a social and cultural point of view. With globalization drivers rooted in economic forces, technology, politics, and culture, there is a clear historic debate on how globalization affects the world (Pieterse, 2010; Potter et al., 2008; McGrew,

2000). But what these theories all have in common is that globalization is affecting the world, and greatly so. The spread of globalization has connected the world in new ways. Cities and urban regions are becoming economic capitals as centre's of global service production and increasingly play an important role in economic advancement (Castells, 2000). Undeniably, economic growth and development among Nation States throughout the world are highly dependent on the international activities that take place within their cities (Sassen, 2001). Understanding the way theses urban centers connect and physically develop will help clarify globalizations impact on urban form.

2.2 Globalization and Urban Development

What is apparent from the points mentioned above is that far from being placeless, globalization is a process that is concentrated in, but not limited to, a particular urban location. While the economic and political manifestations of globalization are important in understanding where the phenomenon is heading, the focus of this study concentrates on the influences of globalization on urban development, manifested in urban centers and regions.

One of the earliest writers on the global city concept was Marshall McLuhan in his 1964 book 'Understanding Media' where he reflects on the creation of a global village through the instantaneous movement of information. This notion has been further explored by authors from different perspectives such as Friedmann's "World City Hypotheiss" (1986), Sassen's 'Global City' (2001), and Allen Scott's 'Global City Regions' theory (2002). These concepts explore issues such as power, command and control centers, producer service firms, and transnational urban systems. They further expand on the development and classification of cities and their evolving structural position in a global environment. According to Friedmann (1986), world city theory is about spatial organization and international labor, leading, according to Taylor (2006) and Sassen (2001), to more relevant definitions of cities, which emphasize the production of financial and service products.

That said, the prevalent literature has mainly focused on exploring the developing hierarchy of cities throughout the world based upon particular criteria, sometimes excluding many important urban centers and neglecting to understand the overall

fundamental reasons for the development of these places such as complementarities and competition (Parsa et al., 2002). Still no other writer has delved into the phenomenon of explaining global urban complexities more than Castells (2000) with the concept of ‘Space of Flows’ which is an in-depth look at the complex interaction between technology, society, and space. The concept revolves around the abstraction of space and time with the higher levels of technological connectivity we see today. Through the concept he links electronic communication and material networks and the ‘elite’ networks of work, rest and play. These links develop a new spatial logic for the realities of the global world, in essence a new social morphology (ibid). While sometimes metaphorical and symbolic, Castells’ work has developed into a foundation on how academics in the field perceive and understand physical space and is mirrored in the work of many authors and researchers such as Sassen and Scott, both mentioned above. From an urban perspective, Castells (ibid) sees globalization as a ‘network society’, with cities existing as crucial nodes. He identifies global cities as “the most direct illustration” of hubs and nodes. This means that global cities are centers of advanced services, creating new knowledge within a network of information flows. Olds (2002) from another perspective looks further into how globalization has driven changes in urban development. He sees changing spatial order influencing five emerging forms of development; urban mega-projects, world/global cities, extended metropolitan regions, trans-border regions, and international development corridors, all considered hubs and nodes by Castells definition. It is largely through these urban unions and interactions, both locally and regionally that economic goals are achieved (Parsa et al., 2002).

The common denominator for most of these theories is the emergence of new types of urban systems such as the ‘World City Network’ theory developed by Peter Taylor (Taylor et al., 2006). The theory questions the relevance of traditional concepts of urban space, which focus on physical form such as zone, sector, and multiple nuclei theories within the realities of globalization (LeGates and Stout, 2011). This new network based theory of the urban development has been explored further through Taylor’s Globalization and World Cities (GaWC) research network. The result has been a move away from the physical representations of how cities form and grow to one that is based on technological and economic drivers in a more interconnected world system. Sassen’s work on producer service firms and transnational urban systems have led GaWC to develop specific mapping methodologies to quantitatively analyze world city networks.

What made this methodology important was that it was the first attempt to define, categorize and rank global cities based on their connectivity using relational data (Taylor et al., 2006). It went further than Sassen's three global cities to a complex system of positioning that identifies three levels of global cities and several sub-ranks. What we can conclude from GaWC's ongoing research is that in many ways, both positively or negatively, cities have been affected by globalization and new telecommunication and network structures developing around the world. Although the world is subject to constant change, the speed of new development has never been as rapid as in the last three decades. Ultimately, the study of globalization involves understanding the competitiveness of cities in economic terms, as well as their marketing, and branding (Jensen-Butler, 1999).

2.3 Globalization in the Middle East

As the focus of this study is on a specific geographic area, it would be prudent to first define the region and the countries it includes. While the British originally used the term 'Middle East' in the mid-nineteenth century in relation to the location of their political interests in the area, the use of the phrase was expanded by the American military to distinguish the area between the 'Far East' and the 'Near East' that centered on the Persian Gulf (Koppes, 1976). With time this definition has expanded to include or exclude various countries in the region. Typically, the area's boundaries are from Turkey in the north to Yemen in the south and Egypt in the west to Iran in the east. Egypt's inclusion in the Middle East also varies with the emergence of the term MENA (Middle East North Africa), which limits Middle Eastern countries to those located in South-West Asia and not North Africa (Henry and Springborg, 2010).

The region is characterized by both oil producing and trade oriented countries that have varied political structures and economic growth patterns. These differences have created three distinct types of states in the region, namely, monarchies such as the Arab Gulf States and Jordan, democracies such as Turkey, Israel, and Lebanon, and praetorian republics where the military and civilian bureaucracy controls many aspects of the political regime such as Syria, Yemen, Iran, and Iraq (ibid). The political characteristics of each type of government have affected the way that each country has dealt with their private sectors and how they have integrated into the global economy. What makes this important is that some academics believe that politics, not economics, culture, or religion

is the main driver for economic development. Henry and Springborg (2010:3) state, “Political rather than economic factors have been the primary cause of the rate and method by which countries of the region have been incorporated into the globalized economy”. This perspective is essential to understanding globalization’s spread in the Middle East and provides important insights on an area where globalization is sometimes perceived as a threat to Islamic, or cultural identities (Jordan, 2011; Ahmed and Donnan, 1994).

From a globalization perspective, the early twentieth century Middle East was in a strong position to take advantage of a more interconnected world. Unfortunately, many countries in the region were unable to adjust to more outward focused economic policies that depended more on private sector growth as opposed to political control. It wasn’t until the late twentieth century that these countries began to slowly restructure their political economies with mixed results (Henry and Springborg, 2010). For most of these Middle Eastern countries, the original ‘Washington Consensus’, a set of policy reforms promoted to developing countries promoted by international institutions such as the World Bank and the IMF as well as the US government (Williamson, 2000), was the accepted framework used to integrate into the global market (Naim, 2000). Now considered a narrow approach to development, it was replaced in 2008 by the World Bank’s ‘Growth Report’ that outlined strategies for sustained growth and inclusive development’ (Spence, 2008). While focusing on specific policy recommendations that promote growth and global integration, the emphasis on governance and public accountability in the report has made many of the governments in the region anxious. Most feared that this focus would challenge their existing power structures and possibly their future as ruling elites (Rodrik, 2006). The compromise undertaken by these governments was an attempt to implement open economic policies while maintaining political control that limited accountability, and thus inevitably development.

Another major factor in the development of the region was the numerous oil booms that culminated with the period from 2003 to 2008. Increased revenues from oil and gas exports during this period had a positive effect on business, investment and urban growth, not only to oil producing countries but also to others in the region who provided services and labor (Henry and Springborg, 2010). Coupled with growth in population, education, and increased economic development, the Middle East has become attractive for direct

foreign investment. That said, States in the region only achieved marginal success in diversifying their economies and integrating them into the global marketplace (Rodrik, 2006).

While the geographic location and political economies of the Middle East can be described collectively, there are various differences in history, relationships, and resources that make various countries stand out in regard to globalization. Six States are of considerable interest. They are Saudi Arabia, The United Arab Emirates, Qatar, Bahrain, Kuwait, and Oman, known collectively at the Gulf Corporation Council or the GCC. These monarchies constitute a unique case of globalization and are strongly integrated into the global economy due to the oil industry. All six have put into place strong strategies to achieve long-term growth based on oil rents, global services, and international investment. This includes the beginning of a European Union type structuring of open borders and cooperation between the participating states (Low and Salazar, 2011; Foley, 2010). Saudi Arabia, the largest country in the GCC has been described as ‘Developmental Monarchy’ that mimics the developmental States of East Asia by creating an environment that nurtures the private sector through strategic planning and business policies (Niblock and Malik, 2007). The following section will outline how Saudi Arabia and other GCC states have developed from simple settlements to globally interconnected countries that have witnessed massive socio-economic change in less than a century.

2.3.1 Modernization in the Middle East

In his book ‘The passing of traditional society: Modernizing the Middle East’, Daniel Lerner states “what the West is, the Middle East seeks to become” (Lerner, 1958:47). While influential in describing the process of modernization and mass media in the Middle East, Lerner showed strong bias towards western models of development. Modernization is ultimately a development theory that raises economic levels to those of developed countries, originally defined as western societies (Jordan, 2011). But who is to say that other models of economic development are less appropriate, especially when socio-culture elements have evolved in different ways. Globalization among other things is a movement of ideas, a movement that has no specific direction. Leaving it up to the recipient to adapt these ideas to their specific network needs. Lerner takes the theory of

modernization further by linking it negatively to religion. From a regional standpoint he states that “Islam is absolutely defenseless” against the “rationalist” spirit of western style democracies (Lerner, 1958:47). While religion and culture are important issues in the Middle East that have directly influenced the spread of various manifestations of globalization, many people in the area find increased connectivity, be it through finance, western culture, or ideas, a threat to their cultural and religious identities. Not surprisingly, they do not want to emulate the west but to deal with modernization on their own terms (Jordan, 2011; Henry and Springborg, 2010; Kiely and Marfleet, 2004).

The GCC stands out primarily because of its rapid, oil driven, modernization process. That said, the region has always been a crossroads between the Near and Far East, linking Europe and India. It includes some of the oldest trade and pilgrimage routes in the world and has linked the people of the Red Sea and the Persian Gulf through complex political, economic, and cultural relationships for centuries (Held and Ulrichsen, 2013). This interaction with the rest of the world has also influenced the way they perceive and adapt to change, which has resulted in the modern states that exist today. External control over the then sheikdoms in Bahrain, the UAE, Qatar and Kuwait was limited to the establishment of British protectorates linked to British interests in India (Jordan, 2011). Only Saudi Arabia and Oman were never formally protected although they maintained political and security agreements with western governments, especially after oil was discovered in the area. While the region has always been important on a global and religious level, it was mainly oil revenue that provided the means for them to change from small city-states and tribal areas controlled by a small group of ruling families and powerful merchants to become the modern, centralized countries we see today (Held and Ulrichsen, 2013).

Though Arabs in the GCC define themselves through a complex set of traditional and religious values and customs, their historic outward looking perspective allows them to take advantage of new developments and technology to strengthen existing economic and political power structures. They have in essence modernized their societies while maintaining their traditional government structures (Foley, 2010). That said, while the process of modernization has accomplished much in a very short period of time, Oil rents are still crucial to maintaining economic and political stability in the region, something that the GCC is clearly attempting to rectify through diversification and increased global

connectivity and competitiveness (Low and Salazar, 2011). While great strides have taken place to improve the situation in all GGC states. The UAE and Bahrain and more recently Qatar have shown strong leadership and clear focus in attaining these goals. They have begun to implement new policies to deal with inefficient financial and economic shortcomings. They have also adapted new methods of governance and socio-economic development and have attempted to project a more positive image to the rest of the world. That said, while Saudi Arabia holds a unique place in the GCC, it has taken more time to implement reforms. It is the largest and most populated nation with the largest oil reserves. It also is the most conservative and is the most dependent on oil rents. The challenges facing the country are considerable but the raw potential could potentially surpass all other GCC States combined (Long and Maisel, 2010). It is the focus of this study to concentrate on the unique Saudi Arabian situation. The following section will look at Saudi Arabia's modernization process and the ongoing challenges it faces to globalize its economy.

2.3.2 Saudi Arabia's Development Process

Saudi Arabia's history reaches back into antiquity and is a reflection of its mostly harsh desert climate. Though sparsely populated at the time, it still included various ancient kingdoms surrounded by nomadic tribes and small-scale cultivation of land focused in valleys and oases. Interest focused on the west coast of the peninsula with the emergence of Makkah as a religious center and the seasonal trade routes providing incense from the south to the Roman Empire in the northwest linked through 'Arabia Petraea', the Roman province of Arabia established in the 2nd century AD, the south of which is now the northwestern part of Saudi Arabia (Jordan, 2011). The west coast later gained importance as the birthplace of Islam and the site of the Muslim annual pilgrimage in the 6th century AD, and then subsequently as a part of the Ottoman Empire in the 16th century AD. Current Saudi Arabia emerged from the strongly tribal center of the Arabian Peninsula in 1934 through conquest and diplomacy, uniting the various regions and emirates into one nation through a monarchical system of government encouraged by western countries (Henry and Springborg, 2010).

Saudi Arabia's rapid transformation over the last eighty years has been a direct result of the discovery of oil and is directly linked to rentier state theory. For Saudi Arabia and

other GCC countries, it refers to the sale of natural resources to generate income or 'rent' that supports the economy (Luciani, 1995). In the case of Saudi Arabia and other oil rich countries in the Gulf, this means that oil income covers the cost of running governments as well as subsidizing many of the main commodities and services. As citizens are not directly taxed, less importance is placed on public opinion with nationals having little say in the running of government. Luciani (1995) goes further to suggest that rentier economic structures discourage the application of democracy, breeds corruption and less business transparency, and encourages an environment that is based personal networking and connections as opposed to competition. While these flaws are prevalent in the Saudi political and economic system, they can be traced back to cultural behavioral structures that were prevalent in the region long before the discovery of oil (Long and Maisel, 2010). The only difference is the scale and impact oil has made on the process. That said, Saudi's development process has shifted in the last ten years from providing basic services and re-distribution of oil wealth to focus on long-term economic goals that depend on economic diversification, accountability, and transparency (Henry and Springborg, 2010; MEP, 2009). This is mostly due to the realization that inward looking economic strategies have their limits in providing growth and development. By opening their economies, GCC countries have inadvertently created environments where the behavioral patterns of their citizens have started to change. Exposure to other forms of political structures through mass media and Internet coupled with stronger education has started to alter what nationals perceive as their rights. Clearly this change shows the powerful impact globalization has had on the region.

What is clear is that Saudi Arabia can no longer follow its own rules but must integrate into the global system. As the world evolves, so have rentier States as dependence on natural resources is offset by new services, industries, and new governance structures. The GCC monarchies have always strived to govern through traditional Islamic guidelines, where rulers are accountable for their actions to a higher power (Jordan, 2011). This is a distinct difference between the Gulf monarchies and afore mentioned praetorian republics and is a reason for the rapid development and success of the region. Surprisingly the majority of nationals in Saudi Arabia are generally content with the monarchical system of governance though they seek more accountability and transparency (Long and Maisel, 2010). While there has been a clear shift towards adapting global economic policies in Saudi Arabia, little has been done to shift their political practices to

be more in-line with western democracies. That said, the move to a more democratic society is slowly starting to emerge in the GCC and elsewhere in the region, leading many authors question the importance of the Nation State in a global world as mentioned in depth in the previous sections (Held and Ulrichsen, 2013). But the question here should not be about retaining power but instead should focus on economic and political policies that have been put into place to help these countries merge into the global world.

Ong (2006) explores how emerging economies such as those in the GCC have adapted policies to interact with global entities such as the World Trade Organization (WTO). An example is the concept of 'Graduated Sovereignty' where countries create special economic zones (SEZ) that follow a different set of rules that are more aligned with global regulatory agencies and thus with multinational corporations in order to be globally competitive. Ong goes further to describe how this concept could have negative connotations of 'Graduated Citizenship' where residents, be they local or foreign are treated differently depending on their positions in society (Ong, 2006). Nowhere are these two concepts more evident than in the GCC and Saudi Arabia specifically. Because of the global importance of the country's oil reserves, Saudi Arabia, more so than any other country, is in a position to seek alternative policies that benefit it politically while outwardly impacting global policy without following global norms. A clear example is the country's influence on the global oil market, which affects energy prices, consumption, and growth in most of the developed world. From another perspective, the country is diversifying its economy and has shown great strides in global integration through complex economic strategies including industrial cities, business districts, research universities, and special economic zones. Furthermore, these SEZ's and virtually all construction in the country is dependent on a migrant workforce that is treated as inferior residents with few rights.

Clearly these contradictions are considerable and strongly affect Saudi Arabia's ability to merge into the global economy and has created a negative image abroad. While much has been achieved since the creation of the modern Saudi Arabian state a little more than eighty years ago, it will take time for the country to adapt to global realities. Most of Saudi Arabia's achievements have been based on government foresight to seek outside assistance to rapidly jumpstart its economy. As mentioned earlier, Saudi was influenced in the past by various foreign governments. This eventually led to what Jordan (2011:77)

calls the development of a “network of transnational partnerships forming complex adaptive systems”. It is through these relationships that Saudi has brought about the transfer of knowledge, management and technology that stimulated its development process. The most prominent example of this system was the creation of the Arabian-American Oil Company (Aramco) from a group of global oil companies (Standard Oil, Texaco, Exxon, Mobil) that was slowly moved under Saudi control between 1972 and 1990 (Henry and Springborg, 2010). That said, Saudi Arabia has repeatedly used this development model in a wide range of industries and has even formalized some of its elements to increase Saudi Arabian contribution to the workforce coined as ‘Saudization’ and to expand foreign study scholarships, into its long-term development plans (Farsi, 1982). The first of a series of five-year development plans was established in 1970 and included a long-term economic vision for the country to be archived by 2024 (MEP, 2009). Objectives centered on developing infrastructure, increasing gross domestic product, and developing human resources (Farsi, 1982). By 1985, attention shifted to diversifying the country’s economy, and continued until the end of the seventh planning period from 2000-2004. In 2005 the plan shifted again to focus on increasing national as well as foreign investment and to further develop local human resources.

During the preparation of this study, Saudi Arabia completed its ninth development planning period from 2010-2014. The plan balanced long-term development and economic goals with the realities of a global economy and its various implications. Having been structured during the global financial and economic crisis that began in 2008, the plan is more outward looking than previous plans and refocuses efforts on developing a modern infrastructure while diversifying the economy, enhancing competitiveness, and accelerating the transformation to a knowledge-based economy (MEP, 2009). Clearly planning focus has shifted from general modernization and improving standards of living to attempting to compete on a more global level. One of the notable objectives of the plan is to strengthen economic integration and synergies with the states of the Gulf Cooperation Council (GCC) in particular, echoing the shift towards developing an Arab block of countries similar to the EU (Low and Salazar, 2011; Foley, 2010). As Keivani and others (2003:6) state “Regional political and economic development in the Middle Eastern region must similarly reach a stage where mutual economic interests take precedence over narrower political divisions and thus allow such synergies to be realistically contemplated”. They then go on to stress the importance of

these urban unions and institutionalization on achieving economic goals and identify the United Arab Emirates (UAE) and the GCC as the logical location for one of these development corridors.

2.4 Urban Responses to Globalization in the Middle East

2.4.1 Background

As mentioned earlier in this chapter, the focus of this study is on globalization's influence on urban development and its branding, which is manifested in urban centers. Cities in the Middle East have historically been associated with a narrative of loss that describes a shift from the Islamic Ottoman Empire to colonial influence (Elsheshtawy, 2004). This has given rise to the perception that Middle Eastern States are considered third world countries and are perceived to be different and thus less advanced than the rest of the developed world. They have been typically defined by orientalist concepts such as heritage, culture, and traditions, all seen as the main factors limiting growth and modernization (Said, 1979). But it is a more recent shift in history to colonization that in many ways defines much of the initial modernization efforts in the overall region and introduces a new perspective when studying the Middle Eastern city. The much-discussed colonial narrative has been the focus of academic study on cities in the region and has led to the realization that colonization or its influence is not the only factor that is responsible for the limited urban development (Elsheshtawy, 2004). Henry and Springborg (2010:6) explore this concept and note that much of the region, especially the Arab Persian Gulf States, "fell under the influence of Western powers without experiencing the full effect of colonial rule". Others go further to stress that there is no typical Islamic or Arab city and each case is unique and should be studied individually (Elsheshtawy, 2004).

Scholars like Fuccaro (2001) have explored a broader focus that looks at regional context as well as the individual characteristics of each city. Such research has much merit as it looks at Middle Eastern cities from a socio-political perspective that sees development as a result of specific contemporary conditions such as social, political, and economic factors working at a global level. This contemporary focus, when merged with the historical and religious context, provides a balanced way of examining the Middle Eastern city. That said, the response to globalization in cities around the world is also relevant to the Middle East. Themes such as sameness, western hegemony, and loss of local identity play an

important role in defining how modern cities are changing. Still the literature seems to show that globalization itself does lead to loss of identity or heritage (Elsheshtawy, 2004). Globalization is a phenomenon that results in many different physical manifestations, some positive and some negative. While there has been a shift in local political power structures that have made urban centers important on a global scale, new trends on how cities are being geographically and spatially divided are starting to emerge. Cities attract a highly-skilled workforce as well as an even larger low-paid support structure. This is evident in emerging economies that focus on megaprojects such as those located in the Middle East, which attract a large amount of migrant construction labor. This has resulted in the spread of social polarization and the creation of dual-cities in some instances (Moulaert et al., 2003; Sassen, 2001).

Elsheshtawy (2004) further reflects that these spatial inequalities incite resentment, instability, and possibly conflict and are the root of many emerging urban problems. As these cities are being rushed through the development process, they lack the time needed to develop balanced communities that make cities successful. Dubai, which has been remarkable in its quick rise to become a global city both regionally and internationally, still shows an absence of the underlining feeling of holistic community or a balanced urban fabric. This leads one to assume that while megaprojects are important in aligning various new cities with existing global centers of power, they do not necessarily guarantee a successful city as their main elements target a certain elite class of residents. Another consequence of globalization mentioned by various authors revolves around the concept of quartering of urban space where areas of the city are exclusive to the rich and are protected (Elsheshtawy, 2004; Marcuse and Kempen, 2000). These urban developments include gated communities and high-rise towers and on a lesser level urban areas and services targeting a more affluent level of society. The strong segregation of society prevalent in Middle Eastern cities is more noticeable than in its western counterparts and highlights the efforts that must be placed in developing competitive urban areas in the region.

While many of the elements mentioned above strongly relate to recent manifestations of globalization in the Middle East, some cities such as Dubai have shown great strides and success in aligning themselves to global urban trends. Saudi Arabia has long lagged behind the rest of the GCC states in opening its local economy to the world. Still the

realization that successful growth and prosperity can only be achieved by adapting to a global environment has not been overlooked. The country has slowly and sometimes very hesitantly put into place policies that will shape its ability to compete on a global level. The following sections will look at this process and the direction Saudi Arabia is heading to integrate into the global world.

2.4.2 Urban Transformations in Saudi Arabia

The Saudi Arabian five-year plan initiative beginning in 1970 spearheaded the effort to modernize the country. The plans included strategies to improve all aspects of Saudi society including education, health, economy and industry (MEP, 2009). Supported by oil rents, the implementation of these plans resulted in incredible changes to the urban fabric of the country (Jordan, 2011; Edadan and Hathloul, 1995; Farsi, 1982). While traditional life was slowly influenced to include modern amenities and services, the greatest visible change was in urban form. In a very short period of time, new building methods and materials transformed cities, towns, and villages that were originally constructed with stone or mud brick. Camel caravan routes were replaced by roads and highway systems. Modern ports brought in new products and technologies, new businesses opened and prospered. Industrial parks were developed, mass-media flourished, and easier and safer travel brought interaction with other cultures and new ideas (Jordan, 2011).

In the forty years from 1950 to 1990 the urban population of Saudi Arabia increased from 10% to 77% to reach 82.5% in 2012 and continues to strongly grow (UNData, 2013). The government's desire to create a modern State and the increase in Saudi Arabia's urban population resulted in massive changes to the physical nature of most cities and towns in the country. These changes concentrated mainly in the capital Riyadh as well as in the main cities of Jeddah, Dammam, Makkah, and Madinah. As Fraser and Golzari (2014:63) note "As in other Middle Eastern countries, the process of modernization in Saudi Arabia is largely physical and heavily imitative of western model's and lifestyles". These new types of built form and city planning practices introduced by ARAMCO, the Saudi American Oil Company, and encouraged by the government to curb unplanned development led many residents to question the social and physical Saudi Arabian identity (Ibid). By reinforcing the street grid pattern and government approved housing

specifications in later stages of national development, the government sent a message to the local population that newly developed urban areas and modern structures were associated with freedom from traditional social restrictions through an urban image that was perceived to be modern and thus better than traditional urban forms. Moreover, any individuality in the creation and articulation of this new urban form was encouraged and perceived as progressive.

The Saudi Arabian government used the concept of ‘image’, reinforced by policy, in the early years of national development to influence the way the public choose to live and interact with others in relation to urban form. Still many residents resisted the push to move away from traditional architecture resulting in “a clear visual contradiction” between old and new (Fraser and Golzari, 2014:70). This hurried urban growth coupled with a fast-growing population led to creation of many challenges to both national and local government agencies. Issues such as unregulated urban sprawl, infrastructure capacity limitations, inadequate services, neglected older areas, and others placed pressure on existing capabilities that have not been able to grow at the same pace (Edadan and Hathloul, 1995). Moreover, it was almost impossible for the government to maintain a balanced level of services and facilities to meet the needs resulting from this massive increase in urbanization and urban population. Additionally, with this sudden oil driven change came conflict. Some felt that this new consumerism, technology transfer, interaction, and dependence on western entities were not in-line with conservative Islamic teachings and local cultural values (Jordan, 2011). These tensions tempered Saudi Arabia’s move to modernization and have slowed potential levels of beneficial change that could have been achieved. One of the main challenges facing the Saudi government is reaching a balance between change and respect of cultural and religious values (Ibid). But with time and coupled with stronger leadership, resistance has decreased. That said, Saudi Arabia in the last ten years has shown massive efforts to re-define its development process by introducing various urban developments and mega projects.

2.4.3 Special Economic Zones in Saudi Arabia

To reach economic and development goals mentioned above, Saudi Arabia has in the past focused on establishing industrial centers that have played an important role in defining the country’s economic future. This has included a strong drive to diversify the economy

through polarization strategies such as growth poles that focus development on specific urban areas (Moulaert et al., 2003; Edadan and Hathloul, 1995). This included a drive to develop industrial zones on the outskirts of urban centers. These areas were usually accompanied with rent and development incentives to encourage investment and have a socio-economic role in regional urban and economic development plans (Salonen, 2010). Meng (2003) goes further by classifying industrial areas as an early type of 'Free Economic Zone' or FEZ that has, in its many forms, greatly impacted the world economy and has allowed countries with closed economic systems to allow foreign participation and investment without changing their existing economic policies. Meng (2003) goes on to discuss the difference between the various types of FEZs such as Special Economic Zones (SEZ) and Export Processing Zones (EPZ) depending on their territorial distinction of either closed enclave or an open area. Other authors have classified industrial centers and FEZ/SEZ based on scale, facilities, or management. Salonen (2010) breaks this categorization into smaller industrial parks with central management, common facilities and services, to industrial development zones that might also include preferential policies and laws to a large-scale special economic development zone that is characterized by special economic laws and incentives as well as preferential business policies.

For the purposes of this study the focus will be on Saudi Arabia's use of industrial parks, the larger scale industrial city initiatives and finally the use of special economic zones (SEZ) and large-scale Urban Development Projects (UDP) to spearhead change and economic diversity. Used since the 1950's, SEZs have become an integral part of trade and foreign investment policy in developing countries such as Saudi Arabia that are trying to integrate into the global market by shifting away from import to export driven growth (Farole and Akinci, 2011). The World Bank's Foreign Investment Advisory Service lists four main policy objectives for establishing SEZs. These are attracting foreign direct investment (FDI), the reduction of unemployment, the support of national economic reform strategies, and finally as incubators for the use of new policies and approaches (Akinci and Crittle, 2008:3). Both China's large-scale SEZs and Dubai's free zones are notable examples of countries that have successfully achieved some or all of these objectives. That said, while the use of SEZs have shown a mixed level of success, their use as a tool for investment, trade, growth, and policy is undisputed. The global spread of SEZ's around the world and their role in areas like East Asia is a clear result of the unprecedented globalization of investment and trade that started to take shape in the

1970s to rapidly expand in the 1990s and 2000s through highly integrated global production networks (Farole and Akinci, 2011).

Still some scholars believe that traditional export driven models in their present state are not enough to create competitive advantage or drive economic growth. New and more sophisticated models must be developed to take advantage of global markets and investment trends. Farole and Akinci (2011) see the recent shift away from industrial zones and EPZs as a move towards comprehensive zone development that places focus on physical, financial, and strategic connections between local economies and other specialized zones. Development trends seem to be heading towards larger projects that include industrial, commercial, residential, cultural, as well as tourism elements or in the direction of specialized developments that focus on advanced services like information technology, communication, and logistics. While SEZs are expected to increase in significance, it is not their physical or planning elements that will make them successful in providing jobs, attracting investment, or assisting in local growth, rather it will be their relevance to the specific context in which they exist, the networks they are related to, as well as their implementation and management. These goals are clearly in line with Saudi Arabia's development strategy. While early plans focused on the development of industrial centers on the outskirts of major cities in the country, there was a drive to develop a more comprehensive development zone as far back as 1970 when the 'Royal Commission of Jubail and Yanbu' (RCJY) was established with the goal of creating two new 'cities' in the country based on the existing towns of Jubail and Yanbu. These plans didn't occur in a vacuum but were based on existing new town development initiatives developed in the UK in the mid 20th century (Ramos, 2016; Ward, 2016).

Meng (2003) considers the RCJY projects as industrial development zones that include an industrial area and a residential area with basic services that were planned to spearhead the modernization of Saudi Arabia's two coastal regions. They were also planned to provide new strategic outlets on Red Sea and the Persian Gulf, handling most of the country's sea-borne trade (RCJY, 2000). Both Jubail and Yanbu targeted local companies partnered with foreign entities through joint venture structures, mirroring Saudi Arabia's original development strategy that utilizes complex adaptive systems. The two projects worked as incubators for global interaction and new spatial planning policies. While successful in some areas, the zones, called locally 'The Royal Commission' have taken a

very long time to develop into communities. They have also shown various negative social aspects of globalization such as social polarization, quartering of urban space, graduated sovereignty, and dual-city elements mentioned earlier in this chapter. More so, low-wage migrant workers are housed in very basic camps at a considerable distance from the development or residential zones. It is still unclear if Saudi Arabia's most recent strategy to develop special economic development zones will be much different (Farole and Akinci, 2011; Salonen, 2010). Called 'Economic Cities' the Saudi Arabian government seeks to emulate the successes experienced in cities such as Singapore and Dubai. Ramos (2016) sees this development process as a continuous competitive cycle that was later imitated by the less developed Dubai at the time in the creation of the Jebel Ali port and city development. Subsequently the cycle came full circle as Saudi Arabia set plans to mirror Dubai's success through the King Abdullah Economic City port driven project launched in 2005 (ibid).

The World Bank states "Economic cities create value and opportunities for citizens, businesses, and society by efficiently using the tangible and intangible assets of cities and enabling productive, inclusive, and sustainable economic activity" (Suzuki et al., 2010:xvii). This encompassing definition looks to develop an economic system that is more sustainable, innovative, and inclusive, within a larger more diverse cultural system. While such cities in Saudi Arabia are being planned to take advantage of new trends in global networks and connectivity, there is no clear sign that provisions have been placed to integrate all levels of society into these cities or if these cities can develop strong community elements that are vital in creating a successful identity.

2.5 Conclusion

While there is a perception that globalization is imposed on less developed nations which are adapting to the realities of a more interconnected world, it is shortsighted to ignore the complex actors and networks, both externally and internally that are involved in the development and spread of this global connectivity. This chapter has highlighted some of the major issues that relate to globalization in the GCC and specifically Saudi Arabia. Concepts such as the importance of cities in this new world order, competitiveness, politics, institutionalization, and urban synergies all play an important role in achieving economic success. Nowhere has this 'global city' model been more influential in defining

urban growth than in the emerging economics of the GCC who have placed great effort and investment into their cities to integrate into the world economy. They have not only focused on oil and petrochemicals to drive this growth but have shown strong initiatives to diversify their markets into every industry and service with the hope of gaining economic prominence and connectivity on a regional and eventually a global level. In a short period of time, the GCC has developed into a strong economic node with ties to both the West and more recently to the Far East where the shift of economic power is moving.

While initiatives in developing an open economy in an authoritarian political structure isn't a typically accepted discourse, the GCC has shown the ability to learn, adapt, and develop based on their own terms. That is not to say that this process is not without its own unique set of problems. It is important to focus on understanding why these cities succeed or fail and to learn from the issues that arise during this process. Saudi Arabia, because of its conservative and until recently restricted environment, is dealing with the effects of globalization on a scale that surpasses any other GCC State. Coupled with massive development that has been spearheaded by initiatives instituted by the government of King Abdullah which took power in 2005, the country is facing a multitude of challenges that affect their success as a major player on the global stage. This chapter has highlighted many of the issues facing Saudi Arabia and frames the way economic, urban, and social change is developed and promoted, something that will be explored in the next chapter through the focus on place branding as a tool to achieve local and regional competitive advantage.

Chapter 3 Place Branding and its Use in the Middle East

3.1 Introduction

While the impact of globalization on the creation of a new spatial order is still evolving, the transition to a new form of advanced capitalism in urban and regional governance is strongly becoming apparent (Harvey, 1990). The spread of capitalism has led to the creation of new systems of meaning for cities, incorporated into a more commercial system of signification and evaluation (Short and Kim, 1999). Ultimately globalization predominantly takes place in cities, which embody contemporary urban dynamics, which are its spatial expression (LeGates and Stout, 2011; Taylor et al., 2006). The expected growth of the world's urban population by 2050 makes this focus on cities not only important, but also imperative to global development (UN, 2014). Cities not only hold an essential economic role but also act as agents for social, cultural, environmental, and political change and are shaping the way the world functions and interacts (Berg and Björner, 2014).

In the book 'The Condition of Postmodernity', David Harvey (1990) explores the effects of postmodernism on the conceptualization of place in cities and is one of the first authors to link globalization and the use of place images. While critical of postmodernist architecture and urban design, Harvey sees development projects as sanitized versions of a city's identity, which do not reflect real urban life (ibid). He goes on to argue that the cultural occurrence of postmodernity is a response to 'time-space compression', a theory that accelerates or ignores spatial and temporal distances through technology, the same drivers that make globalization possible. This acceleration is linked to faster capital turnover where the production of 'image' becomes a commodity that is produced, especially where it is directly related to production and consumption in the form of promotion or advertising (ibid).

From an urban perspective, Harvey states that "cities and places now, it seems, take much more care to create a positive image of place, and have sought an architecture and forms of urban design that respond to this need" (Harvey, 1990:91), which is a direct response to the increasingly competitive nature of the world around us. Harvey goes on to state

“imaging a city through the organization of spectacular urban spaces becomes a means to attract capital and people in a period of intensified inter-urban competition and urban entrepreneurialism” (Harvey, 1990:92). Therefore, cities, in order to be competitive on the global stage must have the ability to attract investment, business, residents, and visitors (Ward, 1998; Deffner and Liouris, 2005; Short and Kim, 1999; Kotler and Haider, 1997; Ashworth and Voogd, 1990). In this context, globalization does not represent a threat to place but strengthens its role as a product to be commoditized. Thus, cities resort to changing their image to target external consumption (Ashworth and Voogd, 1990). This is done by creating a positive environment and image that encourages all aspects of life through the use of generalized images (Kavaratzis, 2004; Short and Kim, 1999; Ashworth and Voogd, 1990). This type of marketing is successful when businesses and residents are satisfied with their living conditions, and new investors and tourists reach their expectations (Kotler et al., 1999). Furthermore, the importance of image and identity has reached a point where a constructed image may surpass the actual reality of the city and is a strong component in shaping user perceptions (Deffner and Liouris, 2005).

Cities exist in markets so they compete for resources with other urban areas, consciously or unconsciously. The active influence of these markets is an unavoidable reality of competition. In order to keep pace with competition, the policies of local governments and urban management must be conducted from a business and entrepreneurial standpoint (Van den Berg and Braun, 1999). Strategy and market-orientation become key factors in planning and managing urban areas and their ability to respond to increasing competition derived from Globalization (ibid). Porters (1990) theory on competitiveness provides a conceptual framework, which highlights the significance of a city’s role as an economic actor. This theory stresses that competition is dynamic, evolving, and includes a city’s potential in regards to improvement and innovation. The foundation of Porter's theory, illustrated by ‘Porter's diamond’, is a system of determinants, which shapes the environment that promotes or limits competitive advantage in an industry (ibid). This positioning revolves around how a city differentiates itself from its competitors in the minds of its target market (Berg and Björner, 2014; Clifton, 2009). In essence, developing a competitive identity in relation to other similar cities stems from a city’s strategic planning. Ashworth and Voogd (1990) assert that this competitive struggle has always been occurring, but what is new is the strategic application of marketing approaches to increase their success. They further associate the promotion of places, similar to Harvey

(1990), with an indifferent commodification that represents social and economic competitive potential. The issue here is that places are not clearly defined products with clear consumption patterns but a complex package of goods, services and experiences that are consumed differently than a typical product (Gold and Ward, 1994). That said, this promotion of place plays an important role in forming a link between a city's potential and the use of this potential. But this potential is directly linked to a city's strategic assets and goals on a larger scale. As Berg and Björner, (2014:7) put it, "without a strategic perspective, city branding does not make sense". By defining and promoting city's product and image, urban management can enhance it's competitiveness and attract resources, investment, and business (Deffner and Liouris, 2005). That said, interest in marketing as an urban policy tool is not a new phenomenon. Terms such as place 'promotion' and city 'boosterism' have been used in the past to describe efforts to attract residents to the American west in the 1800's and tourists to seaside resorts in 19th century Europe (Gold and Ward, 1994). This trend continued with promotion policies in suburbs, industrial, and post-industrial cities, and the development and marketing of new English towns in the 60's and 70's (Ward, 1998; Gold and Ward, 1994). While the objective of place promotion was originally to provide social benefit, it is now influenced by market dynamics where places compete with each other from an economic standpoint. The main shift in place promotion theory occurred when policy makers introduced material incentives to encourage private development, linking urban planning with promotion (Short and Kim, 1999; Gold and Ward, 1994).

It is clear from the sections above that there is no dispute in academia when addressing the value of using marketing to achieve competitive and positioning goals. Still many authors highlight the need for more research in the field as many new concepts and theories have evolved to highlight the distinction between what marketing a specific urban product and building an overall holistic brand for a place means (Kavaratzis, 2004; Rainisto, 2003; Short and Kim, 1999; Kotler and Haider, 1997). This constantly shifting landscape has created clear distinctions between different aspects of using marketing as an urban policy tool. Terms such as place promotion, place marketing, and recently place branding, all interconnect but mean different things, encouraging authors in the field to re-examine and re-evaluate place branding theory and practice to help clarify confusion and reach a consensus in academia (Kavaratzis et al., 2015). A 2011 review of the place branding field by Lucarelli and Olof Berg (2011) for example identified 217 articles in

87 different journals published between 1988 and 2009. This is a clear reflection of the state of the literature in this twenty-year period and validated claims by many authors that there is still much to be done to expand place branding knowledge in the future. For the sake of comparison, a more recent, albeit basic, search of online journal resources for the term ‘place branding’ during the same period was conducted for this study. The search using the Oxford SOLO Database yielded 185 entries that specifically relate to place branding, with the major topics being place marketing, urban studies, and tourism. The difference in number is a reflection of the complexity of the Lucarelli and Olof Berg study criteria and the much simpler SOLO search.

A second search was then conducted for the period from 2010 to 2014, the four-year period not covered in the 2011 study. The SOLO database search this time yielded 154 journal articles that relate specifically to the term ‘place branding’, highlighting its clear distinction as a stand-alone area of study. That so many articles have been written in this four-year period compared to a slightly larger number in the twenty years before 2010 is a testament to how important the field of place branding has become and how fast it is growing. Coupled with this collection of these journal articles is a group of new books that have recently been published exploring key contemporary issues and challenges of place branding from various perspectives and in different contexts (Berg and Björner, 2014; Musterd and Kovács, 2013; Govers and Go, 2009; Kavaratzis et al., 2015). These books have also focused on theories of place branding and new and innovative ways to explore this field of knowledge. The following sections highlight the major key issues in recent literature as their understanding. It further provides the research with a solid foundation to build a relevant conceptual framework and mythology to study place branding in Saudi Arabia’s new cities.

3.2 History of Place Branding and its Terminology

Historically, the concept of consciously highlighting a place’s attributes started to appear in the 1970s as a part of tourism and urban policy literature as a promotion strategy (Hankinson, 2001; Gold and Ward, 1994). With time, the process became more specific to different uses causing, as mentioned earlier, a lack of clarity and consensus. Terms used include place promotion, marketing, and branding, which have all have been used, occasionally in different contexts, with similar meanings and associations.

In this thesis, city marketing refers to the strategic promotion of a city by encouraging certain activities to take place and can be associated with a specific urban product or products, including the city itself (Smyth, 2005). Gold and Ward (1994:2) define place promotion as “the conscious use of publicity and marketing to communicate selective images of specific geographic localities or areas to a target audience”. It involves putting policies in place to encourage economic development through advertising, lobbying, and other incentives on different physical scales and has been recently replaced by the general term of ‘place branding’, which expands the definition to include branding of larger urban areas and nations (Anholt, 2003; Fan, 2006) and can be used interchangeably with the term ‘city branding’ when describing how the process relates to cities (Lucarelli and Olof Berg, 2011). Therefore, a city brand is the message that is communicated, and city branding refers to how the brand is developed and communicated (Fan, 2014). While the term also encompasses many typical marketing activities that include promotion, positioning, and sales, place branding places more emphasis on the communicative aspects of the marketing efforts and the holistic image of a place (Kavaratzis, 2004) as it is a “continuous process interlinked with all marketing efforts and with the whole planning exercise” (Kavaratzis, 2007:704). In essence it is the task of managing competitive identity (Anholt, 2011).

While place branding on a city level, in its simplest form, includes the use of logos, slogans, and trademarks on a city scale (Kavaratzis and Ashworth, 2005), the term reflects much more complexity and mirrors the aforementioned definition of place promotion by Gold and Ward (1994) quite closely. Still many place branding theories put much emphasis on the importance of urban policies and financial incentives that make a city competitive and encourage private development. Such leverage strategies include the designation of special economic and development zones, preferential treatment of investors, land-leasing instruments, key infrastructure projects, and direct investment in urban development (Wu, 2003). The use of these urban policies as primary components in place branding has shown that the field has moved past traditional marketing structures to be strongly linked to city planning and governance practices as well as urban growth and economic development strategies (Kavaratzis, 2007; Rainisto, 2003). This also results in various political and cultural implications such as stimulating social development, increasing competitive advantage, and reinforcing local identity among city residents (Kavaratzis, 2004). Policy elements such as these, when coupled with strong

place branding efforts, have given cities in emerging economies the ability to distinguish themselves from their competition on a regional and global level. However, this increased complexity also brings many challenges as they involve a large number of varied stakeholders, making the process difficult to properly manage, measure, and control (Berg and Björner, 2014; Kavaratzis and Kalandides, 2015; Ashworth, 2010).

Looking deeper into place branding strategy, there is a consensus in the literature that a place brand is more than an identifying name, logo, or slogan given to a place. It encompasses a wide range of physical and socio-psychological attributes, which need to be understood and linked together (Kavaratzis and Ashworth, 2005; Kavaratzis et al., 2015). Kalandides and others (2011:21) define a brand as “the purposeful symbolic embodiment of an object (product, organization, city, etc.) in order to create associations and expectations around it”. Kavaratzis and Kalandides (2015) take this even further by including the interactions between those associations. These definitions cover many elements and ideas that range from the use of iconic or historic buildings to city values and future visions, focusing on the philosophy of a place as opposed to a logo or slogan (Berg and Björner, 2014). The following section further explores the evolution of place branding theory in the literature and its main components, strengths, and weaknesses.

3.3 Place Branding Theory

While the focus of this study is on place branding, because of the overlap between theories and the academic work compiled on other urban marketing concepts, it would be prudent to first explore other place related marketing concepts. Place or city marketing for example is the strategic promotion of a city through encouraging certain activities to take place, usually associated with a specific urban product. It can further be encapsulated in three metaphors, the city as a market, a product, and a business (Corsico, 1994). Such metaphors are also useful in conceptualizing the more holistic aspects of place branding as they include both business principles that reflect consumer and market needs as well as a set of tools to reach these goals. City marketing starts with a clear segmentation that focuses on specific target groups or markets and takes place at both the national and international level (Short and Kim, 1999; Ashworth and Voogd, 1990). Kotler (1997) identifies four main target groups when segmenting urban users. They are visitors,

residents, businesses, and, international markets. For residents, the city is a place to live, work, and play while providing a wide range of supporting facilities like education, health care, and recreation to suit every economic level. For companies, it is a place to do business, hire employees, and to find supporting services. For visitors, it offers a mix of culture, art, and entertainment. But these actions and services overlap to create a more holistic entity that does not link to a specific urban product. Companies revolve around people who will ultimately be residents or visitors. Tourists will also use services developed for residents and vice versa. This clear overlap in segmentation transcends city marketing to place branding, making it a complex and complicated process that requires a unique set of strategies to overcome challenges. According to Ashworth and Voogd (1990) there are three main segmentation strategies. A focus strategy, in which the emphasis is only on one target group or market. A differentiation strategy, in which various target-markets are chosen but each is implemented using a different approach, and finally a non-differentiation strategy, where all target-markets are developed in the same way with the same approach. While city marketing uses these strategies for specific products, in place branding they are seen as components that support a complex holistic goal.

From another perspective, a city provides products that are difficult to separate from their environment. They are highly interdependent and are produced by different means. Generally, these products fall into three types of urban form. They are the individual urban product or service, groups of related services, and most importantly the city or urban agglomeration level (Van den Berg and Braun, 1999), here again the shift from city marketing to place branding is evident as scale and complexity increases. Each segment has numerous associations with the city that affect people's choices to live, visit, or invest. These personal user associations create the city's image. Therefore, the urban agglomeration strategy mainly involves building identity and image through place branding (*ibid*). While cities can gain much from understanding general business marketing and branding, tailored strategies and approaches to urban marketing need to be developed case by case to achieve urban policy and branding objectives (Berg and Björner, 2014). Though there are similarities, every market is different. The main challenge of cities involves more than developing a strong and creative vision; it also includes organizational and managerial competencies to develop competitive advantage. More so, it is imperative for cities to develop a strong organizing capacity for a marketing

policy to be successful. In reality, as mentioned earlier, many different individuals or groups have a stake in the city's marketing and branding efforts and control individual urban products and services. To bring these actors together requires strong administrative control that is directly linked to place branding efforts as it means managing competitive identity on a city scale as opposed to a project level. Van den Berg and Braun (1999), outline specific key elements that make this possible. They are a unified vision of urban development, the ability to develop strategic networks, and strong leadership. All these qualities require capable branding managers that can understand and link these elements and is imperative to the success of the branding process.

Understanding the factors that make place branding strategies successful in cities can assist various public policy makers in implementing strong economic development strategies. Success revolves around their ability to identify and solve a problem through the place branding process (Rainisto, 2003). While improvements in urban planning, infrastructures, basic services, and attractions have been identified to be essential in developing a successful strategic city branding plan, this is directly linked to the development of a realistic vision for the future of the city (Kotler and Haider, 1997). To make this possible, there should be a strong sense of agreement between the different actors of a city as well as a regular evaluation and improvement process. Rainisto (2003) has taken this breakdown further and has identified thirteen success factors which lower risk through place branding in cities. The framework is divided into two parts. The first involves elements and actors which exhibit a determining role in the process such as policy makers and planning groups, the strategic vision for a city and its identity, public-private partnerships, and leadership. The second type of element represents the challenges to urban marketing procedures including political consensus, world market and local development, and fortuitous events (ibid). Here again it is evident that a city's communicated message and resulting place image are key success factors in the overall strategic marketing plan. More so, it is almost impossible to create a city image without establishing the components of urban identity at a strategic level.

3.3.1 Place Branding Frameworks

The evolution of place branding frameworks follows the development in its theory, as it starts with the shift from the marking of products, to urban products, to promotion, to finally reach place branding. As this evolution involves some overlap, the following section will explore the process chronologically to critically evaluate the different methods and build insights on their use. Starting with city marketing, Ashworth and Voogd (1990) developed a process that focuses on places as opposed to consumer products. The process involved three major factors; consumers which includes segmentation and targeting, market strategies that look at promotional, spatial, and organizational marketing measures, and the producer that focuses on product and commodification. While this process rationally reflects marketing in general, it can be seen to simplify the traditional meanings of place; it is the nature of cities to be complex, changing centres of human interaction and trade that do not hold to a single process flow. Therefore, even though the process might be easy to categorize, it is very difficult to implement and adapt. However, it cannot be denied that the concentration of economic, social, and cultural potential has made cities into what they are today. While businesses find that marketing helps them achieve their objectives, city governments strive to promote prosperity for the complete urban community (Van den Berg and Braun, 1999). That said, Ashworth and Voogd (1990) were one of the first to explain in depth how city marketing can be understood and successfully implemented through the use of various conceptual guidelines and tools.

Later Kotler and others (1997, 2002) also attempted to create a distinctive place marketing approach that has become the foundation of many place-marketing practices used today. In their structure, the focus was shifted to different levels of place marketing and how they relate to one another. While the main traditional elements are included such as target markets and marketing factors, a new level was introduced called the planning group where local and regional governments, citizens, and the business community all have a say in the policies being developed to market a city. Both place marketing approaches above have great merit in guiding urban management and public policy makers. In addition, they have led to the development of more refined concepts and ideas on how to market places and cities (Rainisto, 2003). Nevertheless, while promising, many of these methods only reflect consumer product marketing and branding strategies which treat

places like products that require little or no distinction or complexity in their development (Kavaratzis and Ashworth, 2005). That said, place marketing has been supported by many theoretical developments that have paved the way for a more in-depth understanding of marketing implications for urban planning and management on a city scale. Kavaratzis (2004) for example sees city branding from a communication perspective where three types guide a city's image; primary communication, which is the result of a city's physical actions such as development of infrastructure and policy, secondary communication that focuses on the message that a city intentionally gives to the public such as advertising and Public Relations (PR), and finally tertiary communication which relates to public opinion and word-of-mouth advertising that is a direct response of city actions and branding communication (ibid). Therefore, the implementation of place branding strategies is largely dependent on the development, communication, and management of a city's image. Ultimately, all interaction between a city and its users is associated with perceptions and images. "Marketing therefore cannot other than be the conscious and planned practice of signification and representation" (Kavaratzis and Ashworth, 2005:507).

These theories, frameworks, and success factors, while sometimes working on different urban scales, all delve into the core essence of what developing a place brand involves. As every city is different, the early literature added a layer of simplicity to make the place branding process more manageable. Later models also started out with simple core concepts as well but they quickly reached a point that emulated the complexity of the cities they were trying to conceptualize and brand. An example is how Govers and Go (2009) looked at place branding through a three-gap system that focuses on image creation through strategy, performance and satisfaction. Recently others have also promoted what at first glance may seem simpler models to guide managers in their branding efforts. Fan's (2014) Four-D model for example summarizes the place branding process into four distinctive steps, "Discover the core value of the city; Define a clear city brand position; Design a consistent and relevant visual identity; and Deliver the brand core message through integrated channels" (Fan, 2014:143). On the surface, these processes seem quite simple, but looking deeper into the different steps and what they involve you realize that they basically cover many if not all of the elements that exist in other frameworks mentioned above. What Fan's steps include that the majority of other frameworks do not, is a way to abstract the branding process in a simple way, while

maintaining its complexity, something that works well when you are looking to identify the core branding concepts of a city. The following table compares and critically analyses various place branding frameworks:

Author	Year	Terminology	Goals	Notes
Porter	1990	Competition Theory	Gaining competitive advantage through a set of determinants including structure, demand and factor conditions and related industries.	Theoretical foundation. General/Less focused on places.
Ashworth and Voogd	1990	City Marketing Process	Defining the elements in the place marketing process. Consumer, market strategies, and the producer. Focus on segmentation.	Restrictive to different situations, difficult to adapt.
Gold and Ward	1994	Place Promotion Strategies	The conscious use of publicity and marketing strategies to attract business, investment, residents and tourists. Boosterism. Economic perspective.	Historic view of place promotion. sets the foundation for many other frameworks.
Anholt	2000	City Branding	City branding hexagon. Measures brand equity in cities to assist in benchmarking and positioning.	Not relevant to new cities as the elements focus on existing attributes.
Kotler et al.	2002	Place Marketing Approach	Based on a system of concentric levels that includes target markets, marketing factors and a planning group. Focus on positioning and segmentation.	Focus on elements that should be included in the marketing process but does not look at the holistic picture.
Rainisto	2003	Place Marketing Success Factors	Derived from Kotler's place marketing approach that focuses on thirteen different factors that lead to success divided in two parts, elements with a determining role and challenges.	Detailed framework. No explanation on how to use it to reach optimum success.
Kavaratzis	2004	Place Branding	Follows a communication perspective to implement branding strategies (physical actions, the portrayed message, public opinion). Focus on policy.	A different way of looking at the place branding process. Easy to implement and design.
Anholt	2007	Place Branding	Managing competitive identity.	Encompassing definition of place branding.
Govers and Go	2009	Place Branding	Linking place identity with place image and reputation. Three-gap model, (strategy, performance, satisfaction.	Focuses on image creation. A dynamic and innovative process.
Fan	2014	Place Branding	The Four-D's. Discover the core value of the city; Define a clear city brand position; Design a consistent and relevant visual identity; and Deliver the brand core message.	Simplifies the implementation process. Gives brand managers more control of what's important.

Table 3-1 Summary of theories and terminology

While it would be ambitious to try to create a detailed framework for the development of new city brands, this thesis only sets the foundation for future study by focusing on identifying key elements involved in their development and communication. Kavaratzis (2004) refers to this aspect of the branding process as secondary communication that focuses on the message that a city intentionally sends to the public through tools such as advertising, PR, events, and tertiary communication which relates to public opinion and word-of-mouth advertising that is a direct response of city actions and branding communication (ibid). These two levels of communication are also integrated into all existing marketing frameworks such as Ashworth and Voogd's (1990) market strategies that look at promotional, spatial and organizational marketing measures, Kotler and other's (2002) marketing plan, vision and action, and Rainisto's (2003) place identity and image. This type of promotional marketing is basically the strategic branding communication for a city described by Kavaratzis (2004). It focuses on identifying a city's core brand values to define its positioning and identity to reach the elements that make it unique. The next step entails using these elements to develop a strategic branding plan for a place that works in both the short and long term (Fan, 2014). In the case of a city this will include everything that makes it what it is, including physical form, people, environment, events, and even the overall atmosphere. Essentially all the elements that shape people's perception of a city. In essence it is the process of identifying brand identity and positioning, which can only be achieved through in-depth research involving relevant stakeholders in the process (Fan, 2014). This is echoed by Warnaby and Medway in Kavaratzis et al. (2015:7) in how they conceptualise the place product as "a network of stakeholders who collaborate with place users to co-create the place". As branding is a process of communication, it is imperative to understand end-user perceptions to guarantee that the associations and concepts used in the branding communication are correct (Kavaratzis and Ashworth, 2005). The following section will highlight many of the main issues and challenges in recent literature that are important to consider when developing a comprehensive communication strategy for a place brand.

3.3.2 Key Place Branding Issues and Challenges

While both European and North America countries have shown a strong understanding of the application of place branding to their cities and regions (Berg and Björner, 2014), some recurring issues that relate to the success or failure of the branding process stand

out. From another perspective, a very different group of challenges appears when it comes to the implementation of branding strategies in the developing world (Wen and Sui, 2014; Govers and Go, 2009). The relevance of both groups is of the utmost importance to this study as they directly relate to the application place branding strategies in Saudi Arabia. From a global perspective place branding requires a mix of different types of values to make it successful. These values range from local perceptions of place that make it unique such as history, culture and traditions to more strategic national goals (Musterd and Kovács, 2013). What's important to note here is that while national and global strategies look at the holistic picture when it comes to place branding, local government stakeholders have the greatest influence on the branding process making their understanding of place branding imperative to achieving positive results (Björner, 2014). This involvement also allows cities to focus on physical elements that are more in line with international and global standards in the attempt to position themselves in relation to existing global cities (ibid). When done without sensitivity to the uniqueness of place, this results in a city that is devoid of a unique identity, something that is the foundation of a strong place brand and its success. This paradox is mentioned extensively in place branding literature and describes what happens when a city strives to adhere to international and global visual and functional standards while at the same time trying to stand out through its unique local values (Pasquinelli, 2014).

The global association with themes and ideas attempts to give a city a distinctive competitive advantage, usually from an economic standpoint, while at the same time it adversely reduces the uniqueness of its brand. City themes such as creative, smart, sustainable, or economic have become popular in the last twenty years and have been amplified through the spread of globalization (Ren and Berg, 2014). But such positioning has its drawbacks as cities focus on one core element to distinguish themselves from others instead of developing a comprehensive identity based on multiple core elements and values. As Fan (2014:138) states, this abstract association with one core element “downplays their ancient history or heritage, and means that the city's brand becomes associated with a particular aspect without incorporating important cultural, historical and regional factors”. As these themes are usually apportioned through government entities, he goes on to stress the need to involve all levels of stakeholders in the branding process as without their participation, properly branding a city becomes very challenging and is prone to failure (ibid). This overall agreed upon image of a city and how it should be

strategically promoted through imagery is frequently referred to as ‘Imagineering’ (Björner, 2014). While this concept describes how a brand is created through representations of place, it more so stresses the importance of stakeholders in the process. Furthermore, globalization factors such as the increased use of the Internet and the popularity of social media has facilitated the increased involvement of people in the branding process and how the image of a place is perceived. Björner (2014) stresses that with these global changes in technology and communication, top-down approaches to branding are no longer viable. Cities must embrace new realities and find new ways to include all public stakeholders in the process to develop relevant branding strategies (Parker et al., 2015).

Many of the issues mentioned above focus on how to brand a city. Equally important is the concept of what to brand. Recently a lot of attention has been placed on cities that cooperate with each other to create regional or global visibility and competitive advantage. Cities with similar cultural, geographic, or complementing economic attributes have found value in developing unified development strategies, something that is a direct reflection of globalization. Development zones, economic corridors and urban agglomerates have all started to appear in cases where different images are joined to address unified goals that cannot be reached individually (Parsa et al., 2002). This cooperation, be it openly or indirectly, is also starting to appear in branding theory under the term ‘co-branding’ and is usually done through a portfolio of place or city brands developed under one umbrella (Xu et al., 2014). But while a useful tool in economic development, there is a tendency for the main node in the conglomerate to overshadow and sometimes restrict the uniqueness of the other entities involved. Much care needs to be placed to develop a more sophisticated and balanced unified brand with smaller, well-developed sub-brands that can work both collectively and independently to provide strategic benefits for all cities involved (Ren and Berg, 2014).

Another popular phenomenon in place branding is the use of mega-events to enhance a city’s image and global positioning; both through the physical urban development initiatives they include such as infrastructure and iconic sports venues, and the branding opportunities they offer (Levin and Iveroth, 2014). While such events lead to impressive changes in a city’s urban form and global reputation such as Beijing’s transformation as a result of the Olympics or the effect of the World Expo on Shanghai, they sometimes

also come with a large social price as they introduce a wide range of adverse repercussions that range from displacement of residents to loss of historic areas, and paradoxically result in negative effects on a city's image (Dydon, 2011). While understanding these challenges provide some guidance when building place brand around the world, each city or urban area is a different situation with distinctive characteristics and core elements. More so when these cities are located in countries with unique political, social, and economic situations that do not follow North American or European models and need to be explored through a different lens. The following section will highlight some of the main place branding challenges that face nations and cities in the developing world as this study focuses on the Middle East specifically.

3.3.3 Place Branding Challenges in the Developing World

One of the first things that stand out when reviewing the literature is a limited understanding involved in developing a place brand in developing countries. This is compounded further by the wide spectrum of nations that are encompassed under this designation. Looking at case studies in South East Asia (Wen and Sui, 2014), the Middle East (Govers, 2012) and Africa (Santos and Campo, 2014), place branding practices revolve around frameworks that have been developed for functionally complex cities in more democratic and socially cohesive nations. This process is further complicated by top-down government structures and fragmented cooperation between government entities in the developing world (Björner, 2014; Wei et al., 2006). Therefore, many different, and sometimes conflicting channels must be used to properly develop both local and global place brands in these areas (Wen and Sui, 2014).

Taking this argument further we find that various core elements included in popular place branding literature are not applicable to new cities in the developing world. Examples include Dubai's massive urban transformation and China's new cities and supporting areas that have been developed without the inclusion of elements such as history or culture and sometimes have no populations at the time of conception. The resulting cities therefore do not include many of the essential core elements that usually go into creating a city's brand identity (Ren and Berg, 2014; Kavartzis et al., 2015). However, in these cases only the scale is new, as mentioned in chapter 2, new towns have been developed in places like the UK that have used branding strategies as far back as the 60's and 70's.

Surprisingly the elements haven't changed much as recent projects still use brochures and video adverts to promote and build brand awareness (Ward, 1998; Ward, 2016). What has changed, though, is that technology has expanded the tools used to connect stakeholders or include them in the branding process (Wen and Sui, 2014).

However, while these new urban areas lack a connection to the past, they include an identity created by government stakeholders to convey a specific purpose. Ren and Berg (2014:39) state that in situations such as these "it might be more meaningful to talk about identification with a city, and what it stands for, rather than the identity of a city". Branding in this context can focus on creating a sense of inclusion through larger associations to national level core elements. From a different perspective, purposefully designed identities could also be used in situations where cultural and historic elements already exist and are deemed by decision makers to be unnecessary or unsuitable for the global image and position the city is trying to achieve. In such situations, there is a risk of losing the authenticity of the city brand and instead create a place that seems devoid of any uniqueness or soul (Govers, 2012).

From the points above it is very clear that government involvement in the branding process is another key factor in the development of place branding in developing countries. Nations like China and the UAE are very involved with the development and branding of their cities and their positioning on the global stage (Freire, 2012; Govers, 2012; Wei et al., 2006). They usually utilize a top-down approach that sometimes doesn't reflect reality in the cities they are trying to brand. Still that has not gone unnoticed as more and more countries are adapting a more horizontal and interactive method of communication. This includes the use of elements such as festivals and international sport events that require the active involvement of large numbers of stakeholders in the decision process (Ren and Berg, 2014). This shift from 'hard power' which includes tangible elements such as political, economic, and military, to 'soft power' or intangible elements such as culture, values, quality of life, and environment projects a more human image to the world (Wen and Sui, 2014). The use of such intangible elements, though often overlooked or ignored (Kavaratzis and Ashworth, 2015), is integral to the city branding process and can make the concept of place branding an important type of soft power.

The shift of power from nations to cities is strongly mirrored in the globalization literature and is truly a reflection of how important place branding has become in a very short period of time (Taylor et al., 2006; Ohmae, 1995). Furthermore, a nation's image is directly linked to the image of its cities. Björner (2014) takes this argument further by identifying the branding of Chinese cities as an integral part of the country's branding strategy as an open business environment and a powerful global player. Such values are reflected in the branding strategies of many developing countries which are looking to position themselves in regional or global hierarchies of power. Therefore, any attempt at branding cities in these nations must take into account their country's individual global aspirations and the associated existing nation brand and vice versa.

Another issue that has been prevalent in developing countries is the tendency to develop homogeneous pre-branded cities with standardized elements such as sanitized reproductions of historic areas and planned creative atmospheres (Löfgren, 2014). Such 'clones' are referred to as 'a city in a box' and may include a stereotypical branding template. These new cities lack the core elements described earlier in this section that makes a place unique and ultimately acts as a foundation for the city's brand identity. This type of development, referred to by Löfgren (2014:197) as a "building block" city development, is very prevalent in the UAE, Qatar, and China where versions of international museums and even neighbourhoods are constructed to mimic the west. The question here is how to successfully brand a city that copies its core elements from others and sometimes even its creative expression? How do you identify a city's unique elements with no reference to history or culture as a foundation? The growing popularity of new city development have made these questions very relevant as more nations build new cities to compete both regionally and globally. This speed of city development has made the temporal aspect of branding very relevant.

While branding is an integral part of the long-term development strategy for many north American and European cities, others in the developing world do not understand the basics of city branding communication and only focus on short term goals like attracting FDI and sale of property (Fan, 2014). As Wen and Sui (2014:128) state "city branding should be seen as an entire system that needs to be maintained long-term, both domestically and internationally, with the same message". The goal of the branding process is to build a symbolic comprehensive image of the city, including its unique

features and people, and to communicate this image both locally and globally. This type of integrated brand communication is a long-term strategy that grows and develops with a city and should be treated as such. By limiting branding effort to specific city products, events, at specific times, or through a select range of marketing platforms only weakens city brand awareness and ultimately the city brand (Fan, 2014).

Finally, two more challenges stand out in the literature when looking at place branding practices around the world. These are developing “authenticity” and “accreditation” in place branding strategies (Pasquinelli, 2014). Branding in general has very negative connotations when it comes to the public as it is perceived to revolve around self-promotion and economic gain (Ooi, 2014). Hence there is a need to develop a level of trust with end-users that highlights the complex nature of cities. Hughes (1995) defines authenticity as a “contextualized experience that allows consumers to distinguish real from fake”. This involves elements such as an original reference, sincerity, and a distance from economic gains to help consumers develop an emotional link to a brand (Taylor, 2001). In the context of place branding, authenticity, when properly used, is a tool that adds value to a stylized brand through associations that achieve an accurate depiction of a city’s attributes and core elements (Pasquinelli, 2014). It is used to link the dream to the achievable reality in the eyes of target markets through trust. In countries undergoing massive new development, this becomes an important factor in attracting investment and visitors alike and is the cornerstone of an integrated branding strategy (Berg and Björner, 2014). Accreditation takes this further by utilizing external and independent public opinion and references to shape the image of a place. The use of important and popular events such as sporting competitions, exhibitions, and international political meetings build a positive image through association. Famous international personalities also draw interest and provide a city with worldwide exposure (ibid). Another accreditation approach is attracting global brands and headquarters of multinational companies through incentives very much like using a department store in a mall as an anchor (Pasquinelli, 2014). Finally, a city can gain recognition through incentives such as specially developed public services like parks, museums, and festivals to drive positive public sentiment. With the widespread use of technology and social media this becomes an incredibly strong tool in building accreditation and ultimately a strong place brand (Ooi, 2014).

To summarize, the two main groups of challenges are as follows:

General global challenges	Challenges in developing countries
Local, national, and global values	Limited understanding of methodology
Sameness vs. difference	Branding homogenization
Positioning	Government/stakeholder involvement
Imagineering	The temporal aspect of branding
Co-Branding	Authenticity
Use of mega-events	Accreditation

Table 3-2 Main two groups of Place Branding challenges

While all these elements highlight the complexity of the branding process, they also help provide focus on what has worked and what still needs development in the field of place branding. To narrow the scope further the following section will look at place branding in the Middle East with the goal of identifying the specific challenges that directly relate to this region of the world.

3.4 Place Branding in the Context of the Middle East

In the last twenty years, many Middle Eastern countries have started to develop and apply marketing and branding strategies to improve their image with the goal of attracting investment, businesses and tourists in a focused effort to diversify their economies (Freire, 2012). While some of the countries such as those in the GCC have amassed wealth from oil rents, others have had to rely on other means such as tourism and developing a successful business environment to improve their economies (Low and Salazar, 2011). Unfortunately, the literature is quite limited when it comes to the specific topic of place branding in the Middle East. Still some recent case studies are starting to emerge that focus on understanding the challenges of building a place brand in different countries like the UAE (Govers, 2012), Egypt (Taha, 2013), Morocco (Cascón-Pereira and Hernández-Lara, 2013), Jordan (Khirfan and Momani, 2013) and Turkey (Bıçakçı,

2012). No place embodies this phenomenon more than the city-state of Dubai in the UAE. The city has undergone an incredible transformation to become the main commercial and financial hub in the region while building a world-class luxury tourism industry from almost nothing (Bagaeen, 2007). Dubai achieved these designations through the farsighted vision of its government and utilizing innovative and ground-breaking branding strategies on a scale that was until then unheard of (Govers and Go, 2009).

The success of the Dubai brand has highlighted place branding as an important element in the development process and has encouraged others to implement similar strategies to gain competitive advantage and positioning. This was highly evident in the GCC during the financial crisis of 2008 where cities such as Abu Dhabi in the UAE, Doha in Qatar, and Manama in Bahrain felt there was an opportunity to challenge Dubai's positioning in certain markets (Govers, 2012). Even the most conservative of the GCC states, Saudi Arabia is starting to look outside its borders as it seeks investment and diversification (Bagaeen, 2007). The place branding tools used by Dubai to reach these results predictably mirror the issues and challenges of place branding mentioned in the previous sections such as the use of mega events, government involvement in the branding process and accreditation. As they have been using these tools to promote the successful Dubai brand since the 1990's says a lot about their understanding of the branding process and their ability to mould it to fit their specific situation and objectives.

That said, no brand is perfect and even Dubai has neglected various key factors that has a strong effect on its brand. First and foremost is that unforeseeable factors can drastically affect a place brand image. The financial crisis in 2008 was one such unexpected global occurrence and greatly damaged Dubai's global image (Govers, 2012). Dubai's rushed drive towards urbanization, its speed of development, and the neglect of its core cultural and historic values have also damaged the city's sense of authenticity, building an image of a modern metropolis that is perceived by some on one hand as being fake, lacking a soul or any real identity (Govers and Go, 2009) but which others find to be a depiction of modernity and progress and a benchmark to imitate. Clearly a place brand can be many things at once or can be different things to different people, leading to the question of how do we gauge the success of a brand and from what perspective? The ability to understand and apply different branding strategies to can work independently on different

target segments while collectively representing a city is imperative to the development of a comprehensive place branding strategy.

As mentioned in the previous section no city brand is completely separate from its encompassing nation brand. Similar to China (Björner, 2014), Middle Eastern countries must work diligently to dispel negative stereotypes and damaging image that have formed over time. Even a progressive city like Dubai, with little historic context other than its Muslim and Arab heritage, has found it difficult to distance itself from prevalent stereotypes. A study conducted by Govers (2012) found that conceptions of Dubai revolved around a mix of modern luxury and that of traditional Muslim and Arab life. Additionally, mistaken associations were also made with issues like women's rights, which are quite liberal in the country by Middle Eastern standards. This creates a conflict of image that must be addressed in any city branding being implemented. While still a highly successful brand, Dubai is not exempt from making mistakes. Branding strategies in the city focus on tourism, shopping, or investment with few local elements included in the brand identity that has been developed. Furthermore, there is no unified brand for all of the UAE, which is a result of the country's unique political situation resulting in weak coordination between the different actors involved or included (Govers and Go, 2009). In a region such as the Middle East that receives much bad press and has many negative stereotypes, the focus on brand management and re-branding is not only understandable but is an important part of any implemented city branding strategy (Cooper and Momani, 2009). Further complicating the situation are the problems plaguing the region such as conflict, civil unrest, political instability, extremism, and human rights, which all ultimately affect the image and reputation of Middle Eastern countries and their cities that are trying to adapt a more progressive and global outlook. Nevertheless, they still need to replace these negative cogitations with positive images, a process that takes time and effort and includes more than just portraying an attractive image as Cooper and Momani (2009:115) state "if these initiatives are to become reality, these efforts will have to match the positive images abroad with a positive reality at home".

From the discussion above and the previous chapter on globalization and development, there seems to be a strong consensus in the literature that countries in the Middle East must be understood on their own terms and not through western constructs (Jordan, 2011; Henry and Springborg, 2010; Govers and Go, 2009). From a place branding perspective,

it can be concluded that western focused frameworks can only be partially used to properly brand cities in the developing world due to major differences in core elements from governing structures and the participation of actors to different values, ideas and images that relate to the process (Berg and Björner, 2014). But what other alternatives are available? Further research must be made to develop localized frameworks that better address the realities of non-western societies.

3.5 Place Branding in Saudi Arabia

While Saudi Arabia has shown a renewed drive to globalize its economy and attract investment (Jordan, 2011), the literature on Saudi Arabian place branding is almost non-existent at best. The few references available usually involve a brief mention by authors interested in the region, usually in connection to the branding practices of Dubai or what is happening in the GCC in terms of development. Examples include Govers (2012) descriptions of new competition from Saudi Arabia to the Dubai Brand and Bagaeen's (2007) look at the country's diversification, increased competitive nature, as well as its focus on attracting international investment. Another example is from Dinnie (2013:190) who while discussing the development of the King Abdullah Financial District (KAJD) in Riyadh states "the scale of this investment in the city's infrastructure will not only radically transform the essence of the urban environment, it will also help Riyadh to emerge more clearly as a distinctive city brand rather than being known simply as the capital of Saudi Arabia".

From a nation branding perspective, Zhang and Benoit (2004) have explored the communication strategies used by Saudi Arabia to improve its image after the 9/11 attacks in New York. While this example is more of a defensive mechanism as a group of Saudi Arabian extremist citizens were involved in the terrorist attack, it still means that the country is actively monitoring and managing its nation brand. These limited examples from the literature do not mean that the Saudi Arabian government isn't interested in place branding. On the contrary, in recent years it has placed much focus on the field, albeit in an unstructured and uncoordinated way. The lack in research is mainly because few published authors have specifically looked at Saudi Arabia from this perspective. This lack of research is also one of the main reasons why this study is quite relevant in creating new knowledge on development and branding practices in Saudi Arabia.

Looking at government entities and the media, one can find slightly more references to branding efforts in the country. From a tourism perspective, much has been done through the Saudi Commission for Tourism and National Heritage (SCTH) to promote Saudi tourism both domestically and abroad. This includes a focus on international image and the Saudi Arabian tourism brand through national strategies and worldwide exhibitions such as the 'Roads to Arabia' exhibit touring the US and Europe (SCTH, 2014). While SCTH is making positive moves to promote Saudi Arabia internationally, its efforts conflict with foreign policy as the country has yet to implement a general non-religious tourist visa, stating that the country is not ready to open its doors to international tourists (Baker, 2013). Domestically, a considerable amount of effort has been implemented on a city level to build place brands across the country. From an urban perspective, the focus has been on major development and infrastructure projects in all major Saudi Arabian cities such as the Makkah Grand Mosque expansion and the surrounding developments that includes the Makkah Clock Tower, the second tallest building in the world after the Burj Khalifa in Dubai, the new financial district in Riyadh, and major rail and airport projects. But these developments are rarely used to locally or internationally brand the country or its cities through any focused effort or branding practices other than local development and municipality exhibitions and mentions to international investors.

On the other hand, much effort has been placed on developing the intangible branding elements of cities that improve life, increase prestige, and create a sense of belonging. Elements such as Jeddah's open-air museum, the Jeddah fountain and the massive sculpture roundabouts around the city attest to the fact that the municipality has had a long history of developing its city brand on a national level (Farsi, 1982). Sadly, most of these physical developments were implemented in the 70's and 80's and were part of the original planning process for the city that was heavily influenced by American urban planners and was not locally driven or sometimes even appreciated in Saudi Arabia. While the city's municipality undertakes many small social campaigns, its major effort is placed on the annual 'Jeddah Ghair' or 'Jeddah is Different' summer festival that has been exceptional in uniting citywide cooperation and attracting both national and GCC attendance. This festival now includes the recently launched Jeddah Historic Area Festival that was developed with the Saudi Commission for Tourism and National Heritage (SCTH) after the designation of the city's historic centre as a UNESCO World

Heritage Site in June 2014 (UNESCO, 2014). Jeddah's informal designation as being the most visited and liberal city in the country due to its location near Makkah and Islam's most holy site has given it the ability to push the boundaries on what is allowed publicly in Saudi Arabia. Still little coordinated effort has been placed to develop or improve the holistic brand for the city or any other existing city in the country for that matter.

From a different perspective, announcing the development of six new economic cities in Saudi Arabia, spearheaded by the King Abdullah Economic City (KAEC), has led the push to attract both domestic and international investment and interest in the country. The methods used follow the Dubai model which is not surprising as was initially developed by an arm of EMMAR Properties, a Dubai based Emirati company with experience in mega project development in the GCC and with projects around the world. Still it is the first time EMMAR has tried to develop a complete city and has faced many challenges during the ongoing development process of KAEC (KAEC, 2012). The success of the project depends on property sales and long term leasing through marketing and branding efforts that include image development, exhibitions, advertisements, PR, and a limited web and social media presence (KAEC, 2014). While a holistic brand is slowly being developed and more focus has been placed on city branding in the last year, most of the effort has gone to promote and sell individual products that are in varying stages of completion such as the King Abdullah Port, the Industrial Valley and five residential communities (ibid). This study aims to explore KAECs branding strategies with the hope of providing insight on the branding process in Saudi Arabia's new cities.

3.6 Conclusion

A city is a complex living entity and does not follow the same rules as a commercial product branding. By defining a city's unique brand identity, managers can attract investment, business, residents and tourists through proper development and communication. The process of branding itself is complex and requires an in-depth understanding of a city's values and core elements. It also requires strong awareness of issues and challenges that relate to its positioning, governance, stakeholder involvement, authenticity, and accreditation. While all these elements highlight the complexity of the branding process, they also help provide focus on what has worked and what still needs development in the field of branding. Furthermore, city branding processes are geared

towards the development of marketing and promotional strategies for existing places; they do not take two main components into account. The first is the overall impact of macro location and characteristics such as the overall nation image on perceptions from a foreign investment point of view. The majority of these new economic cities are being constructed in the Middle East, Far East, and Africa, none of which follow European and North American notions of popular place branding as local culture, religion, economic forces, and political stability all play defining roles in the attraction of investment and capital. And secondly, they don't address the development of identity and image for cities that do not include an existing urban or social fabric. Even studies that consider new cities usually refer to places like Dubai or Abu Dhabi in the UAE, which are existing cities that have undergone massive development but where a historic urban content still exists.

Finally, city branding in the developing world is seen as a tool, which only has short-term benefits, rather than a means to achieve long-term strategic development and city positioning on a global level, something that only cities such as Dubai have achieved to a certain degree. This absence of strategic awareness and long term vision has created a type of generic city that blindly copies creative vision and builds landmark projects to try to be perceived as innovative, modern and new but without any real substance rooted in urban policy or place branding strategy. As Wen and Sui (2014:127) state, "the 'blind' comparison, or benchmarking, of urban development and city branding programs with programs in other cities is also problematic as strategic opportunities are not seen or acted upon".

Chapter 4 Conceptualising the Place Branding Process in New Cities

4.1 Introduction

The previous two chapters have explored two independent but interconnected areas of knowledge. Chapter 2 highlighted various issues that relate to globalization in the Middle East and specifically in Saudi Arabian cities. Chapter 3 focused on how cities strive to gain competitive advantage through place branding strategies. The theories, frameworks, and success factors mentioned in the chapter delve into the core essence of what developing a place brand involves and highlights the major key issues mentioned in the recent literature. Their understanding, coupled with the main theoretical literature identified in the chapter, provides this research with a solid foundation for building an appropriate conceptual framework and methodology to study place branding processes in Saudi Arabia's new cities.

Building off the literature review, this chapter identifies the key concepts used in this research with the goal of identifying the processes involved in the branding of new cities. It further explores the interactions between stakeholders and new city development with the goal of developing a conceptual framework for analysing the branding process in the region. The conceptualization process involves linking together the two main areas of knowledge, globalization and place branding. This includes identifying the key elements of each theory, then subsequently exploring what influences this process on both a global and local level. It then identifies the socio-cultural challenges that face the process in the context of the Middle East and Saudi Arabia specifically and what mechanisms have been put into place to respond to these challenges. The next step in the process was to address the issue of 'time' as the speed of city development in the region has made the temporal aspect of branding very relevant. Finally, the conceptualization identifies an appropriate lens to explore the process in depth. The process can be summarised in the following diagram:

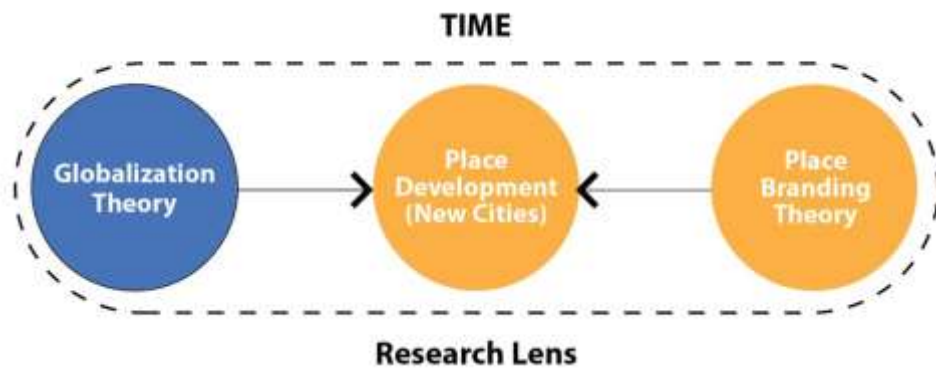


Figure 4-1 Summary of the main theories

Each initial component will be explored in depth in the following sections to reach a conceptual framework that can be used to analyse place branding in Saudi Arabia's new cities.

4.2 Factors Influencing Globalization in the Middle East

As mentioned in chapter 2, globalization is a complex process that includes components that are spatially articulated through a global network of cities. Cities not only hold an essential economic role but also act as agents for social, cultural, environmental, and political change and shape the way the world functions and connects. Understanding this interaction and the subsequent connection it produces between different actors and place is the core goal of this research. In order to conceptualize the branding process in new cities, the study first explores why these cities are being planned and developed as this question is directly related to how their identity is being created and is ultimately branded.

There is a clear consensus in the literature that globalization affects the production of urban form and the way people interact with cities (Taylor et al., 2006; Harvey, 1990; Giddens, 2013; Borja et al., 1997; Gugler, 1996). While the association between place and people has always existed, there has always been an on-going debate on the origin of place identity (Hough, 1990; Hague and Jenkins, 2005). Hough (1990) and Relph (1976) have both gone to great lengths to explore the components of a place in an attempt to identify the different conceptual elements that will be required to study place identity and subsequently place branding in urban areas. These can be summarized as people, the

physical components of a city and how they are used, and the associated meanings people collectively create about a place. These components show that the process of encouraging an identity for places revolves around people and is developed through social interaction. Furthermore, it not only changes as a place develops and transforms physically but also as time goes by (Hague and Jenkins, 2005). Ultimately identity encompasses a wide range of complex meanings that are the by-product of the relationship between physical, social, and cultural entities in a specific place and time and are influenced by human intervention (Butina-Watson and Bentley, 2007). It is these meanings that are communicated through different types of discourses, both textual and visual that create place identity (Hague and Jenkins, 2005) which “lies at the heart of effective place branding” (Kavaratzis et al., 2015:8). From the perspective of globalization, these components can be considered a conscious attempt to influence the development of identity in the form of a place brand discussed in chapter 3. As this brand is being encouraged to represent a specific objective on a macro and micro level, it further includes both global, regional, and local influences that shape what is being built, how it is perceived, and how it links to a specific place such as Saudi Arabia, or to a specific physical form such as a new city.

Globally such influences mirror standards of global integration such as economic goals, connectivity, interdependency, and the spread of technology. However, they also reflect global trends and standards as cities compete as mentioned in chapter 2. Locally in Saudi Arabia, the focus is on political and economic policy, cultural and religious resistance to global integration, issues of graduated sovereignty, and citizenship and the urban responses that have been implemented to help the country integrate into the world’s economy. While a variety of physical actions have been implemented to address this need for expanded global connectivity and integration, the shift from industrial estates to city scale special economic zones is the focus of this study. Here globalization has driven countries in the region to push development by adapting new policies such as complex adaptive systems, SEZs, and increased transparency (Jordan, 2011).

The goal in Saudi Arabia was to diversify their economy and attract FDI while providing services and a better quality of life for their growing population. While these initiatives are a reflection of the conscious effort of the government to drive change, it is balanced by a variety of intangible responses that also influence global integration. These include the country’s unique culture and traditions, the conservative religious nature of Saudi

Arabia, as well as its unique atmosphere, associations, and international image. Additionally, the country is segmented geographically and culturally into distinct regions. In contrast to the historically more progressive west coast of the country, other areas are more tribal and conservative in nature and have shown resistance to western influences causing a rift between tradition, religious values, and modernization (Yamani, 2009). That said the country's younger population increasingly wants to see more social-cultural change, making them more open to western norms. As they seek new identities that include modernization and global integration, some also desire this assimilation to reflect their ingrained traditional and religious values (Omair, 2008; Jordan, 2011). In Saudi Arabia, traditions, social relationships, and religion all shape government entities, institutions, and business practices, something that drives resistance to public inclusion and transparency and makes them much more complex than their western counterparts (Metcalf, 2007). This conceptualization can be summarized in the following diagram:

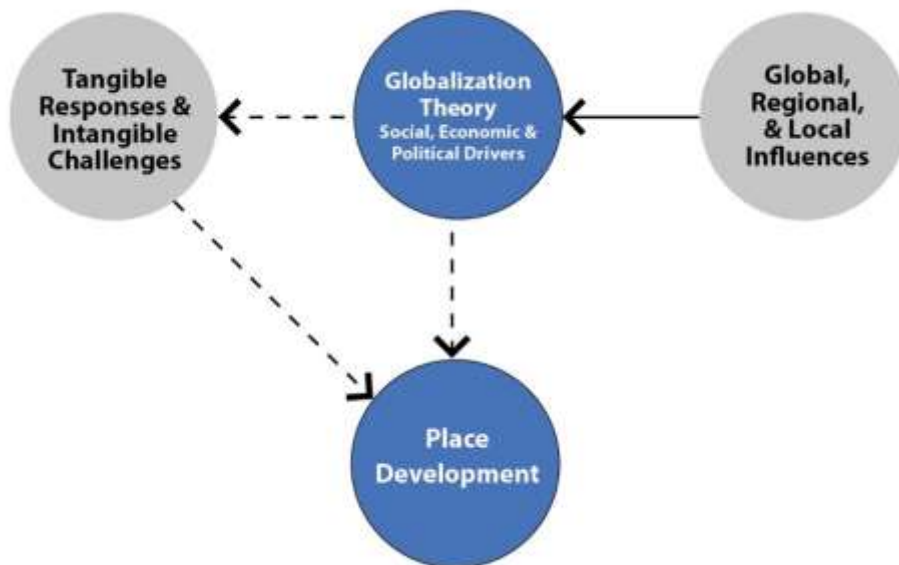


Figure 4-2 Conceptualization of new city development in the Middle East

4.3 Factors Influencing the Place Branding Process

As mentioned in chapter 3, there is a consensus in the literature that a strong place brand encompasses a wide range of physical and socio-psychological attributes and beliefs, which need to be understood and linked together to achieve competitive advantage (Kavaratzis and Ashworth, 2005). From a city perspective, the main challenge is not just

developing a strong and creative vision, but also includes organizational and managerial elements that work behind the scenes as many different stakeholders are represented (Van den Berg and Braun, 1999). While many theories and frameworks delve into the core essence of what developing a place brand involves, they generally have three main elements in common. These are the actual physical entity of the place, which in this study is represented by the city, the projected identity developed by key actors referred to here as the communicated message, and the place experience end-user stakeholders come away with from the branding process, all of which collectively create the 'Place Image'.

Although countries in the global north have shown a strong understanding of the application of place branding to their cities and regions (Berg and Björner, 2014), a very different group of challenges must be taken into account when it comes to the development and implementation of branding strategies in the developing world (Wen and Sui, 2014; Govers and Go, 2009) and in countries such as Saudi Arabia. From a global perspective, place branding requires a mix of different types of values to make it successful. These values range from local perceptions of place that make it unique and are a by-product of local elements such as history, religion, culture, and traditions to more strategic national economic and political goals (Musterd and Kovács, 2013). What is important to note here is that while national and global strategies look at the holistic picture, local government actors have the greatest influence on the process making their understanding of place branding imperative to achieving positive results (Björner, 2014).

As place branding practices revolve around frameworks that have been designed to work in more democratic nations, this process in Saudi Arabia is characterized by top down government structures, fragmented cooperation between public entities, and little stakeholders involvement (Björner, 2014; Wei et al., 2006). In this case, governance is not exemplified by cooperation through networks or partnerships that make such relationships successful (Kooiman, 1993). This governance structure is also mirrored in the organizational structure of companies where private actors tend to function separately and do not strongly engage with public entities. Therefore, place branding in this context must take into account many different, and sometimes conflicting channels both locally and globally (Wen and Sui, 2014). Taking this argument further the literature has shown that many core elements included in popular place branding methodology such as population, atmosphere, and history are not applicable to new cities (Ren and Berg, 2014).

But while these urban areas lack a sense of identity that stems from the present and past, they include one that is created by the government or other actors to convey a specific purpose. In such situations, effort must be placed on identifying the core values of a new city so they may be incorporated in the branding process. These challenges are an integral part of branding a new city and must be addressed in any conceptualization of the place branding process. Here, vision, strategic planning, imagineering, and communication become core components in lieu of more traditional methods that focus on what already exists, the people already there, or events that are happening. Additionally, a successful new city branding plan has to show an understanding of the changes in the wider environment, while comprehending future needs, desires and behaviours of the different targets groups. A plan should also develop a realistic vision for the future of the city and include an action plan for fulfilling this vision that is constantly communicated to end-user stakeholders. Finally, there should be a strong sense of agreement and teamwork between the different actors involved in the development of a city's branding as well as a regular evaluation, improvement, and adaptation process.

Therefore, the conceptualization of place branding focuses on three distinct areas identified in chapter 3; the physical place and its various physical and socio-cultural components and how they have been planned, developed, and implemented. This includes tangible responses to social, economic, and political drivers that make a new city a vibrant entity such as distinctive architecture, infrastructure, and public spaces, as well as events and activities. As these cities are still under construction, focus is placed on visualizations of the city and its gradual physical development progress over time. This leads to the second area identified in the literature; the message developed and communicated for the city by key actors. Without a completed city, place branding becomes the conduit for information and the foundation for the success or failure of a new city. This is reflected in the third and final focus area; the place experience end-user stakeholders come away with from the branding process and the actual development completed. Here all messages that have been communicated, consciously or arbitrarily, the sum of the physical, economic, political, cultural, social, are all synthesised to create a constantly changing meaning for the city. At this stage segmentation becomes very important and comes into play as different messages are developed and communicated by key actors to ultimately be processed by end-users based on individual interest or need. An investor for example will focus on components that positively or negatively relate to business and profit such

as policy, economic incentives, labour, and logistics, while a future resident of the city will place more importance on elements such as job opportunities, housing, schools, entertainment, and lifestyle. This conceptualization can be summarized as follows:

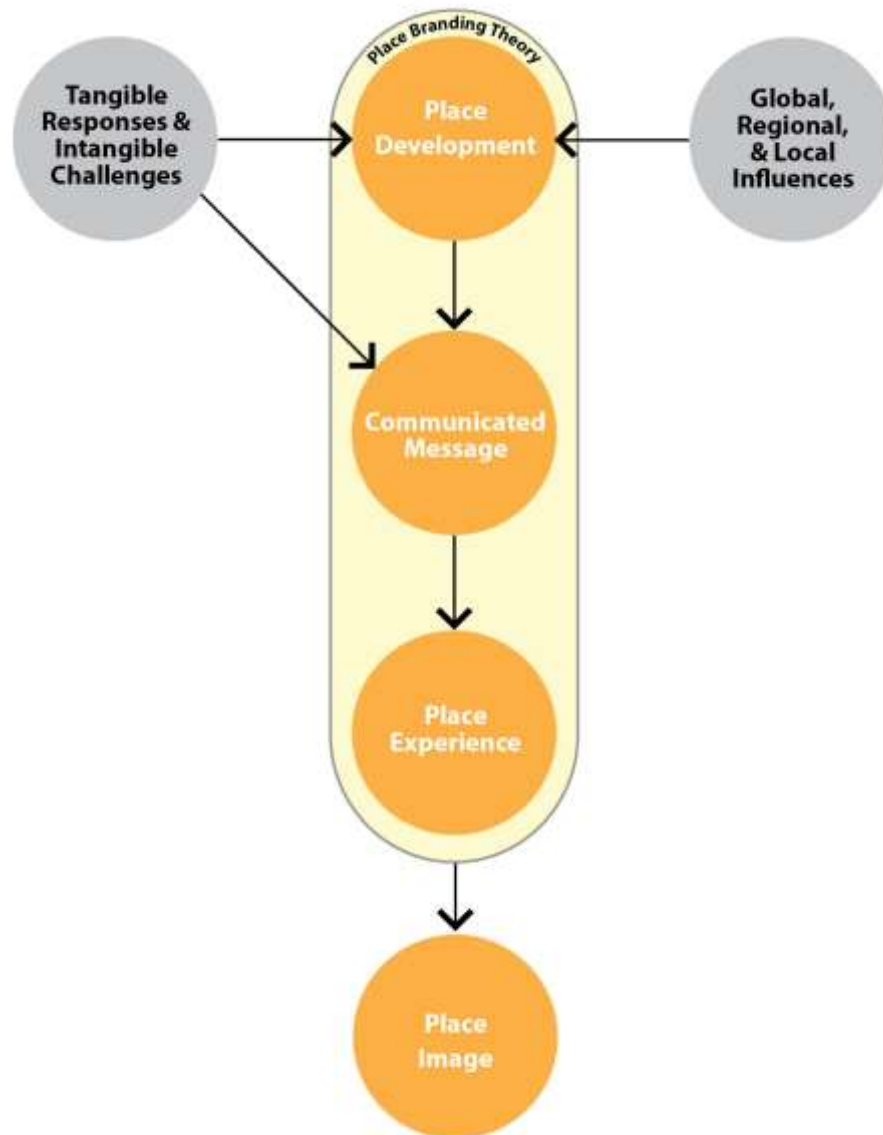


Figure 4-3 Conceptualization of new city branding in the Middle East

4.4 The Temporal Dimension of Place Branding

Cities are always in a state of change and will continue to develop and adapt over time (Fan, 2014). This speed of city development has subsequently made the temporal dimension of branding very relevant as it is considered an integral part of a city's long-term development strategy (ibid). As the branding process changes with the development of the physical place, understanding change over time allows key actors to identify and

take into consideration important milestones in the development process. As with the physical transformation, the time dimension impacts place branding elements as they are in a constant state of flux (Carmona et al., 2003). Carmona (2003) goes on to argue that with time, physical form becomes more complex and meaningful; something that is directly linked to the development process and subsequently the branding of new cities. Campelo in Kavaratzis et al. (2015:8) also identifies time as one of the main constructs that create a sense of place and is “fundamental for the construction of place identity and the place brand”. Therefore, the temporal element cannot be excluded in the conceptualization process. Furthermore, tracing development over different time periods is an integral part of understanding transformation and change. In new city development, this becomes very obvious, as there is initially no urban form or population, and consequently little meaning of urban place other than associations with nature and adjacent urban centres. This is also applicable on the level of other tangible and intangible elements alike. Examples include any economic, political, or socio-cultural structures that are developed over time. Furthermore, elements in the branding process such as message, place experience, and authenticity are all strongly linked to the temporal dimension (Berg and Björner, 2014; Taylor, 2001). Molotch and others (2000) define place character as the merging of different factors such as governance, the urban fabric, and intangible elements such as culture and society in a specific location and time. This is not to say that the temporal aspect does not also affect the social, economic, and political process that influence place development and branding, or the actors that shape the resulting place experience. What it means is that the focus is on how the conglomeration of these complex parts directly relates to the process of place branding when there is a lack of urban form. While the field of place branding is derived from product and corporate branding, the complexity of a city makes it difficult to compare the two (Kotler and Haider, 1997; Kavaratzis, 2004). Still many parallels can be made between them, especially when it comes to the development of the branding process over time. Ultimately the place branding process is a long-term development strategy and must be studied by taking into account the temporal dimension (Musterd and Kovács, 2013). At the same time, like development, branding requires contextual sensitivity and should be conceptualized as part of a wider system that is controlled by specific actors and involves a diverse set of stakeholders. As place associations are interactive and are in a constant state of flux, they depend on the networks in which they exist (Kavaratzis and Kalandides,

2015). The following section will explore these relationships further and how they relate to the place branding process in Saudi Arabia.

4.5 Actors and their roles and interests in relation to Place Branding

The construction of place-identity and through it, place branding, depends on understanding the link between physical form and the symbolic meanings of place (Hague and Jenkins, 2005). As a brand is a social construct, all stakeholders involved in the process, to a certain degree, can affect the meanings associated with the development and use of a place and subsequently the resulting place brand. That said, actors have differing degrees of power in affecting both a places' physical form or identity (Hayward, 2013). Looking at it through the lens of urban transformation, we see a strong correlation between development and actors through agency and structure models, which focus on the different actors and relationships involved in the process as well as the forces that manage these relationships and drive its dynamics (Healey, 1991). Bentley (2004) uses Giddens's (1984) structuration theory to support the development of place and further categorizes the roles actors play in the decision-making process as being controllers, producers, mediators, and users. These categorizations are useful in identifying key actors who affect the process and can be adapted to the development of new cities and their branding. Healey's (1992) institutional model of the development process takes structuration theory further by focusing on the power relationships between actors and how that relates to society.

While an interesting lens to explore the development of urban form, these theories limit analysis to human actors in a process that is much more complex, especially when its scope is expanded to include the concept of place identity and branding. By looking specifically into the link between urban form and identity, another dimension must also be included, that of semiotic concepts and meaning. Places have the ability to be more than just physical form to evolve independently of development and to take on human attributes of life or soul, and possibly becoming actors in their own right. To achieve this goal, focus must be placed on identifying a suitable theoretical lens that links place, actors, and power while taking into account the semiotic meaning of identity and brand. The next section will identify this lens and how it was used in more detail.

4.6 Actor Network Theory in Place Branding

The city is a composite of both people and the physical built environment, where spatial, economic, political, socio-cultural elements all merge to create identity. However, if a city is in its initial stages of development and has yet to develop any substantial urban form or community, the focus shifts from the city to the entities that control the development process and the messages that are used to convey purpose and build a specific brand (Ren and Berg, 2014). To understand how new cities are developed, we need to look at the different relationships that exist between material objects and semiotic concepts that create this abstract city entity and trace its transient development over time in its shift from concept to actual physical form that has an identity. The interactional aspect of place brands mentioned in chapter 3 further highlights the importance of understanding the interactions between stakeholders who are imperative to the creation of a place brand (Kavaratzis and Kalandides, 2015). The Saudi Arabian situation takes this argument further as a unique set of socio-cultural, political, and religious influences all affect the process in different ways and through various actors.

Actor-network theory (ANT), an empirical material-semiotic approach used in social theory, closely mirrors this relationship structure which cannot be simplified by just exploring economic, social, or political motives alone but needs to be investigated by looking at a combination of different human and non-human actors (Callon, 1984; Latour, 2005; Law, 1994; Michael, 1996; Kavaratzis and Kalandides, 2015) and how they interact to develop identity for these new cities. Including the non-human element is relevant here because while the city itself and concept of brand are both human constructs, they shape how we act or perceive a place in this context. The holistic agglomeration of policy, physical form, and community that encompasses a new city transcends the different human actors involved to represent a new entity embodied in concept of the city. In simple terms, while a brand can be encouraged through policy, urban form, events, and designations among other things, it cannot be completely created or controlled as many other elements in a city, both physical and semiotic, develop naturally. That means that eventually a city will take on a life of its own and project its own identity and brand.

Saudi Arabia's new city projects embody this relationship structure more so than other places as they were initially limited in their spatial components, but have since started to slowly develop form and attract residents. This research attempts to link existing place branding theory and the different actors involved in the process. The objective is to reach a list of human and non-human actors that directly or indirectly relate to the creation of a place brand in new cities and then trace the interplay between power and identity over time. By conceptualizing objects like the city as an equal component in the network that creates the place brand, the research explores the capacity for a non-human actor to evolve to different positions of power in the place branding process.

Actor-network theory was first used in the study of science and technology with the goal of explaining how influence is achieved to meet a certain proposition or goal (Callon, 1984; Latour, 1996; Law, 1992). It focuses on the struggle of actors, be they individuals or organizations, human or non-human, to achieve a common aligned interest, attempting to explain how heterogeneous parts become something more (Law, 1992), basically exemplifying the Gestalt psychology where the whole is perceived as other than the sum of its parts (Koffka, 2013). Gestalt theorists see perceptions as a result of complex interactions between different stimuli, something that is ultimately reflected in ANT theory. The theory takes this view a step further by recognizing the importance of non-human entities in the network and linking them to human actors (Ruming, 2008). While an actor can be a specific person or a group of individuals, in many cases it transcends that to become an association of different things or factors that form an actor-network (Tatnall and Burgess, 2002). Therefore, it can be an idea, an object, or even a method of communication.

The next component of the theory is the relationships that are created and developed between the different actors involved in the network. This may include all forms of communication, messages, movement of capital, political agenda, cultural traditions, and religious practices. In essence these comprise the direct and indirect responses to global change and the tangible and intangible elements that have been discussed in the previous sections. Together these actors and relationships link to create the network that converges to achieve a specific goal. Ultimately it is a constantly changing group of entities or actions that is created by including the opinions and influences of different heterogeneous actors, both human and non-human, in the process (Dolwick, 2009). ANT attempts to

explore how these relationships emerge and by what means. It seeks to identify how different human and non-human actors are reflected into this process to achieve a common goal. What is of value here is not only understanding how these actors come into existence and change throughout the process of establishing and developing a network, but how the links between the different actors evolve and interact with other networks (Van der Duim, 2007; Tatnall and Burgess, 2002).

ANT sees collective action to be a direct result of both human and non-human heterogeneous actors that speak different languages who need to be linked and mobilized through relationships in a process akin to translation. This collective action, or as mentioned in the literature ‘collectif’ is very different from the concept of ‘collectively’ grouping people with a common cause (Van der Duim, 2007). It is as Callon and Law (1995:485) state, “an emergent effect created by the interaction of the heterogeneous parts that make it up”. What this means is that the relationships that are created and how they evolve are what are important not the actors themselves (Van der Duim, 2007). That said networks are temporary, fluid and relationship driven. Furthermore, it is important to note that ANT, unlike other theories, involves the non-human element and gives it equal power. It also uses a unique method of translation to bridge the gap between different heterogeneous actors (Ren, 2011; Cohen and Cohen, 2012). It works to convert and transform actors to make them more similar to each other or simplify them while maintaining their unique attributes though ‘black-boxing’. This allows the network to focus on core elements that are relevant while disregarding others (Tatnall and Burgess, 2002). By using this process of ‘translation’, power moves from one key actor to another, be they human or non-human depending on the time and situation.

In ANT, translation is based on three main principles; generalised symmetry, agnosticism, and free association (Callon, 1984). The first, generalised symmetry stipulates that actors are given equal status in the network with no distinction between them. By analysing both human and non-human actors without any discrimination, each is given the ability to take actions and drive the network. The second principle, agnosticism, focuses on impartiality and that any interpretation should be relevant and included, allowing an unbiased understanding of the issue under study (ibid). Finally, free association requires focusing on observation or experience as opposed to theoretical deduction when looking at relationships in a network (ibid). By limiting our assumptions

to why things happen, we are able to explore a wider range of explanations to what is really occurring from different perspectives. It is the relationships between the different actors, which is important and causes a network to reach consensus and a unified goal (Law, 1994). This is achieved in ANT by exploring different stages of the process or 'moments' that include four distinct but sometimes overlapping stages; problematisation, interessement, enrollment and mobilization (Callon, 1984; Michael, 1996). These stages, referred to as the 'sociology of translation', reflect the different steps taken by a primary actor to assert power over others and focus on defining the different actors involved in the process and specifying their roles, interactions, and compliance with a specific goal or message and can explain how networks emerge, and are transformed (Callon, 1984).

Problematization occurs when the main actor in the network defines a specific issue, problem, or question and a means to resolve it. This involves identifying the other actors, both human and non-human, that have a similar vested interest in the issue or problem. The main actor goes on to link all actors together into one network. In essence translating the message in a way to reach consensus between varieties of heterogeneous components of the network. Interessement focuses on how the main actor convinces others to accept the goal of the network and their specific roles to achieve it. This leads to actors being involved in the process and in essence accept or 'enroll' to be a part of the network and encourage others to follow suit. Enrolment is important to the process of translation because the success of any network depends on the relationships or links that form and maintain it. It also allows the main actor to consolidate interests and reinforce the common goal of the network. Finally, mobilization occurs when the goal of the network succeeds and gains acceptance outside the network. This creates a larger network of actors that can be both active and inactive. During this phase, the main actor will develop a clear and ongoing strategy to maintain the network. While achieving mobilization is the main goal of the network, it has been argued that convergence is never stable or fixed. Furthermore, any change in the network, be it planned intervention or natural growth, will force it to return to previous moments of translation (Huxford, 2010). As networks change over time, this means that any attempt to use ANT to reach a specific goal must include clear understanding of time, something that has been re-enforced in the previous section regarding the temporal dimension of place branding. Furthermore, this interaction between different actors is addressed using the concept of 'intermediaries' which can be a variety of things including artefacts, people, messages, meetings, advertising and

representations that all work to reach the desired goal or message (Michael, 1996). Ultimately the objective of actor-network theory is to explore the interactions between major actors to trace how they assert their influence and control on a certain process, problem, or goal, in this case, the development of a place brand.

As the above section shows, ANT is a complex process that involves a large number of different concepts, actors, networks, intermediaries, and relationships that need to be understood when using the theory. It is clear that it has great value when studying the actors and relationships that are developed to achieve a specific goal as it is useful in understanding the complexity of reality and the influence of non-human entities on the development of social processes. Furthermore, it is especially useful when tracing the relationships that influence issues that are strongly contingent on social processes such as perceptions and the interplay between power and identity (Michael, 1996). Recent versions of the theory referred to as 'Post-ANT' explore this perspective by focusing on how alternative realities coexist, are enacted, and preform. This multiplicity offers the opportunity to explore the actions of a network and the resulting connections and conflicts that arise (Law, 2008; Mol, 1999). Consequently, a multiplicity-oriented ANT analysis shifts focus from objects to actions, and from actors to possibilities of enactment and performance (Vikkelsø, 2007). Even though ANT appreciates social interaction, it goes further to include various agents, objects, and communication systems that are essential to the existence of social networks, giving them equal value in analysis (Law, 1992). In essence, it does not only focus on a holistic reality but on enacting specific versions of it.

While ANT is valuable in studying actors and their relationships, it cannot be used in every situation, as it is contingent on specific contexts that lend themselves to its core tenets and processes. Huxford (2010) sees ANT as being very descriptive with too much focus on power, something that is ultimately up to a researcher to identify leaving room for mistakes. That said, in certain situations that primarily involve issues of power with few major actors and specific semiotic meanings, and by using in-depth qualitative research methods to define actors, it can shed much light on the process and can be useful in explaining an issue or problem (Lucarelli and Hallin, 2015; Michael, 1996). As this research aims to explore the development of the initial phases of place branding with few actors and clear messages, ANT is deemed to be an appropriate tool to reach an understanding of what is happening and why. By defining both the direct and indirect

actors/networks influencing place branding, the research attempts to explore the branding process in Saudi Arabia's new cities through the understanding of the networks that have been developed to create it. The complete conceptualization of the place branding process can be summarized in the following figure:

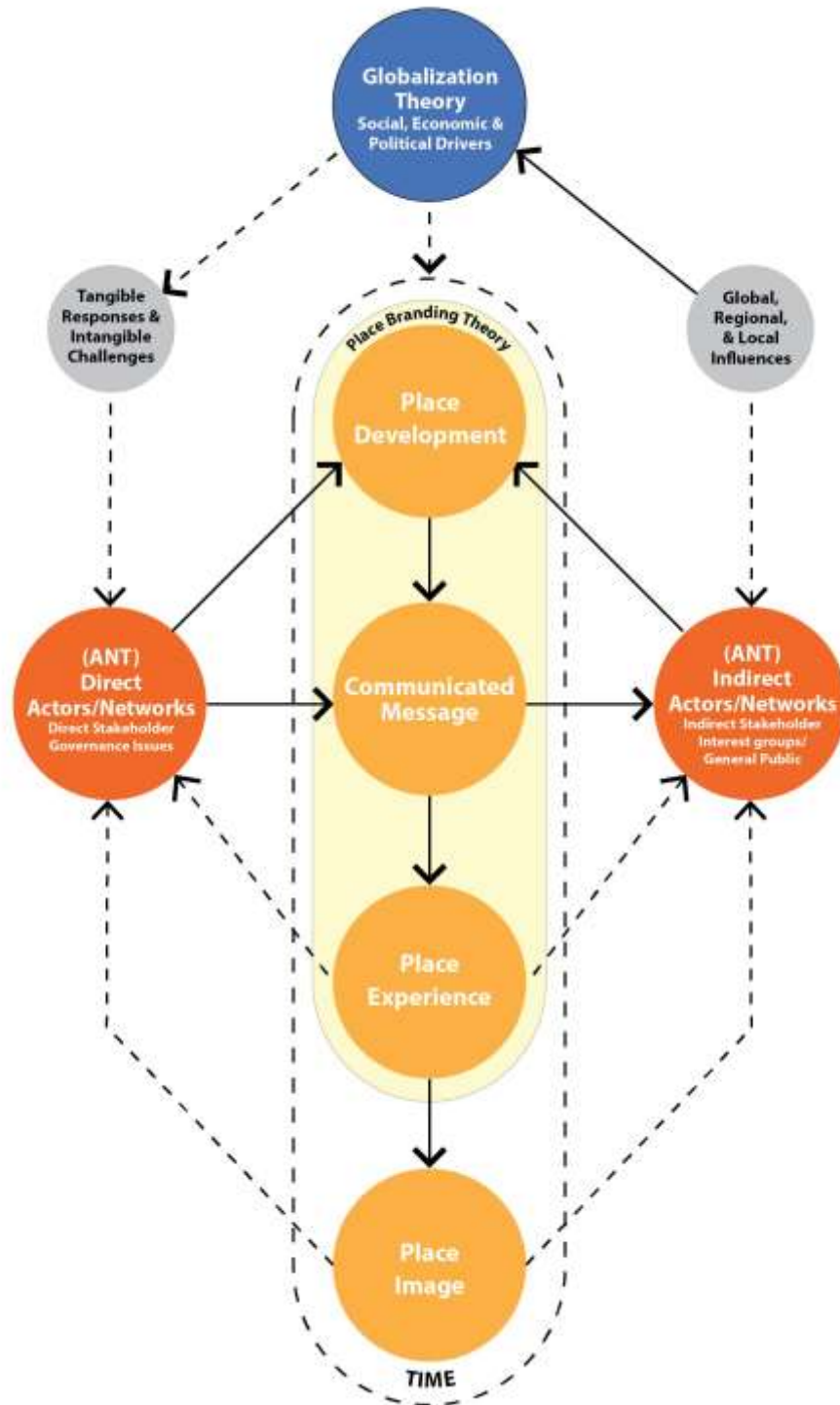


Figure 4-4 Conceptualization of the complete new city branding process

4.7 Conclusion

This chapter has developed a conceptual framework for analysing place branding in the context of Saudi Arabia's new cities. It has highlighted the link between globalization, physical development, place branding, and the study of actors and their relationships through actor-network theory. It has achieved this goal through the following stages:

1. Analysed the key concepts and theories to help identify the main components and dimensions involved in the process. This includes the theories of globalization, place branding, and the temporal dimension of place identity.
2. Identified an appropriate lens to identify and study key actors, relationships, power structures, and influencing factors.
3. Developed a conceptual framework for use in the analysis of place branding in Saudi Arabia's new cities.

Studying the processes, actors, and concepts involved in the branding of Saudi's new cities can assist in answering the question of what is happening in this specific context. However, it is the interactions between the different actors, both human and non-human, that are of note here as they will provide an in-depth look at why it is happening and where focus needs to be placed to improve the understanding of the process. While ANT is deemed a useful theoretical lens in the context of new cities in the early stages of their development, the complex political and social situation in Saudi Arabia makes the identification of these actors and their interactions difficult as many of the reasons behind the decision-making process are not publicly and sometimes organizationally shared with people directly involved with the process. That said, the public-private partnership of the city development and the country's openness when it comes to economic development were expected to ease the impact of these factors and allow access to information that has helped in understanding the process. Still careful thought must be placed on structuring the information gathering process to tease out what is alluded to or is limited to certain officials involved with the development of KAEC. This can only be done through the use of in-depth data collection methods such as interviews and the use of multiple sources of data and their triangulation, elements that must be strongly represented in the methodology of the research outlined in the next chapter.

Chapter 5 Research Methodology

5.1 Introduction

The previous chapter identifies the key theories involved in understanding the process of place branding in Saudi Arabia's new cities. It also explored the interaction between stakeholders and new city development with the goal of developing a conceptual framework for analysing the branding process in the region. As place branding is partially about communication, understanding the process of creating, developing, and managing messages that are developed for the purpose of building identity and branding are imperative to achieve the aims of this study. The literature review and the development of the conceptual framework have also highlighted the role of non-human actors in the process, where cities and their semiotic representations eventually become living entities that could possibly affect the process over time. This chapter goes on to outline the methodological approaches used in the research. It first identifies the scientific orientation of the study, outlining the ontological, epistemological and methodological assumptions used in this research. It then goes on to discuss the adapted research strategy and identify the methods used to collect, interpret, and analyse data. Finally, the research design was outlined and the process of analysing the qualitative data, ethical concerns and research validation was reviewed.

5.2 Scientific Orientation of the Study

The research focuses on the process of creating meanings and concepts to build identity and through identity, a place brand. The literature review has shown that these meanings are not created by the world we live in but by the symbolic relationships we build between ourselves and the places we occupy (Berg and Björner, 2014; Bentley, 2004; Molotch et al., 2000). This premise is the foundation of the ontological, epistemological, and methodological assumptions used in this research. Creswell (1994) simplifies these theories as the nature of reality, the relationship between researcher and research, and how it is investigated. From an ontological perspective, Bryman (2015) sees social science research as being either objectivist or subjectivist. While objectivism sees the world from a positivist perspective with a focus on quantitative data, the subjective view

is more nominalist in nature and is based on abstract reasoning and subjective constructionist interpretation, usually using qualitative data. As this study mainly views the social world as concepts collectively created by individuals to structure reality and focuses on direct experience and interpretation, the general ontology used will be subjective in nature. Methodology will focus on the use of idiographic inquiry and visual hermeneutic communication analysis to explore meanings and concepts that build identity and place brands. This will require interacting with participants to understand specific situations and their subjective perspectives that can lend insights to the processes under study.

Bryman (2015) further breaks down these two perspectives into four distinct epistemological paradigms; functionalist, interpretive, humanist and structuralist. As the research already identifies with being subjectivist in nature, only the radical humanist and the interpretive categories are relevant in this specific case. Of the two, the radical humanist moves beyond social constraints on an individual's potential, something that is not relevant in this case. On the other hand, the interpretive paradigm looks to understand the world around us through the subjective experience or viewpoint of individuals involved in the issue as opposed to the perspective of an observer (*ibid*), which corresponds to the type of inquiry required in this research. Schwandt (2000) takes this stance further by considering knowledge, and subsequently reality, to be constructed through interactions between different individuals in society. This alternative way of perceiving knowledge closely follows theories of social constructionism which focuses on how the world is collectively understood as opposed to how it is objectively perceived (*ibid*).

Siegel (Siegel, 2015) expands on this argument by exploring the concept of identity as it relates to social construction. He sees identity as something that stems from social interaction and relationships and not from inside the individual. Socialisation theory goes into great depth to detail the individual and collective types of social interaction that creates subjective reality. Authors such as Berger & Luckmann (1991) see identity as a by-product of both individual experiences and through the influence of key actors that drive the creation of meaning from an objective to a subjective reality and are able to communicate it in a way that is internalized by individuals. These meanings, when shared through society over time, eventually become reality at a specific point in time.

Ultimately this communication of concepts is achieved through different mediums such as language, conversation, and visual representation, providing a way for individuals to structure the world around them (ibid). Therefore, the relevance of language, both textual and symbolic, is a primary component of social constructionism and the basis of reality at any given time.

But the link between socialisation and identity is not only limited to self, but also to place. This relationship between a person and their environment is studied in depth in the literature. Jorgensen and Stedman (2006) explore concepts such as place identity, attachment, and dependence, that link to the sense of place and influence what we see, feel, and think about the physical world around us. But such influence works both ways. Echoing attributes of non-human actors mentioned in the previous chapter, Butina-Watson and Bentley (2007) have found that our physical world also shapes our identity. This means that identity is much more than just a personal attribute. It is a holistic concept that is associated with the environment we live and the places we build. As a place brand takes identity further by adding conscious agency, the key actors involved in the process become of utmost importance, as do the places themselves. This has led, as mentioned in chapter 4, to the use of actor-network theory as an analytical lens to bridge the gap between the human and material realms in an attempt to attribute agency to non-human actors in the process of developing identity. ANT has shown to be useful in analysing and interpreting the complex dynamics associated with the social construction of identity (Michael, 1996).

Though ANT closely mirrors social constructionism as a means for exploring identity through social interaction, it goes further to include various agents, objects, and communication systems such as text, devices, architecture, concepts, organizations, and even agency itself as essential elements in social networks and should be given equal value in their analysis (Law, 1992). From an ontological and epistemological perspective, by seeing no difference between people and objects, ANT can be seen as going further than social constructionism in how knowledge is created. Law (1992:384) defines actors as “a patterned network of heterogeneous relations, or an effect produced by such a network”. What he is saying is that what matters is the end-result. That both human and non-human attributes are generated in networks that give them social value. However, some social theorists feel ANT has moved away from the interpretative stance as it sees

the process as an evolving phenomenon as opposed to the result of human interpretation (Latour, 1999; Stalder, 2000). Latour (1999) however finds ANT to be neither realist nor relativist in nature and stresses that the resulting social constructs emerge from relationships and not from the actors themselves. Ultimately people do not live in a social vacuum and will never be separated from the things they create. To understand social constructs, it is imperative to look further than the human actors that are involved in the process to the environment, both material and cultural, that influence it.

In the case of this research, a mix of both the human and the material world creates place identity and brands. A city is a complex heterogeneous network of physical attributes that includes human components that define, shape, and use the city. Society does not completely shape a city but nor does the city totally shape society. Both participate in creating the social construct of life and how it is perceived, as one cannot exist without the other. Ultimately actor-network theory attempts to transcend the social by attempting to answer not only the ‘what’ but the ‘why’ and ‘how’ (Law, 1992). By understanding how a place brand is socially constructed, transmitted, and used over time through both human and non-human actors, this research explores how a brand is developed in new cities and how it changes from one form to another over time.

5.3 Research Strategy and Methods

As new city projects are in the early phases of their physical and conceptual development, they lack a foundation of existing knowledge that can be used to identify and test hypothesis. Consequently, a more exploratory, inductive approach should be used to shed light on the complex process of branding in this context. By starting with observation, the research can begin to detect patterns that can lead to hypothesis and finally theory (Bryman, 2015). This type of exploratory method has been found useful in exploring relationships between concepts and phenomena (Saunders et al., 2009). As an inductive approach focuses more on the creation of theory as opposed to a deductive method of testing hypothesis, it is more applicable to the exploration of how people collectively construct their views of social world. Therefore, a qualitative research strategy is best suited to gain the insights needed to theorize the constant shift in social reality (Bryman, 2015).

Qualitative research methods such as observation, interviewing, focus groups and the analysis of text are all used to make sense out of the world around us. While some researchers doubt the validity of this subjective method due to issues of generalization, transparency, and the limited ability to replicate data, it is no less valuable than scientific methods of inquiry (Bryman, 2015; Ritchie et al., 2013). In the specific context of this research, the conceptual framework developed in chapter 4 was used to develop a mixed method methodology that focused on answering the following questions:

1. What is the relationship between the development of new cities and place branding theory?
2. How does this relationship manifest in Saudi Arabia's new city initiatives?
3. What are the critical elements that must be taken into account during the process of branding new cities in Saudi Arabia?
4. How do different actors influence the development of place branding in this context?
5. How do we address the temporal dimension of branding new urban form?
6. What role do concepts and ideas play in the process of branding new cities in Saudi Arabia?

To be able to answer these questions, focus should be placed on exploring actual new city projects in Saudi Arabia. Here the selection of study location becomes of great importance. As mentioned in chapter 2 and 3, Saudi Arabia is in the process of developing four of six planned new cities, spearheaded by the King Abdullah Economic City (KAEC) on the West coast of the country. The goal of these projects are to attract both domestic and international investment that goes beyond oil while providing jobs and housing to its growing population. While all four cities are being developed in tandem, only one, KAEC, has gone past the planning stage to show the beginnings of built form and community. The on-going planning and development of these new cities gives the research the unique opportunity to study the creation of identity and brand as it is happening and in extensive detail. Therefore, this research focused on a case study methodology in its pursuit of new knowledge on place branding in new cities.

Much consideration was made regarding how this will be conducted. Options included a multiple case study scenario between a new city project in Saudi Arabia and an international new city for the sake of comparison. But as little existing knowledge could

be found on the process of branding new cities and the unique political, economic and socio-cultural situation in Saudi Arabia, such a comparison study was difficult to justify and was deferred to future research. Subsequently focus was placed on comparing two new cities in Saudi Arabia. Again, such a comparison was not possible because of the differing stages of development. Yin (2014) emphasises that case study design should reflect the situation under study. While recommending the use of multiple case study design, Yin also concedes that in some situations, a single case is common and sufficient to contribute to knowledge and build theory. While not exclusive, these situations where a case has a critical, unusual, or representational nature, as well as when there is a revelatory or longitudinal purpose (Yin, 2014). Yin further emphasizes that these are not the only situations where single case studies can be used and that the lines between them are sometimes blurred, but the situations mentioned above act as a starting point for justifying the use of a single case study in our research.

As KAEC is the only new city in Saudi Arabia that is in a stage of development that shows both the creation and development of urban form and place brand, it can be considered a critical case that can help build theory on new city development. Additionally, KAEC can also be considered a representative case study as other cities in the country are being developed in a similar manner and are using comparable development processes. Therefore, knowledge gained from KAEC's development and branding can help other cities in the country and possibly the region in understanding the critical elements of the process and avoid possible negative outcomes. Consequently, this study will focus on one single case, namely the King Abdullah Economic City (KAEC), which was discussed in greater detail later in this chapter and in chapter 6.

Based on this case selection process, focus shifts to identifying the most appropriate methods to answer the research questions mentioned earlier in this chapter. As the research primarily focuses on the social construction of a place brand for KAEC, various research methods, concerning the collection and analysis of data become relevant to the study. While an archival search and analysis of articles, press releases, and imagery from public media can help identify major themes regarding perceptions of the city, it was also important to collect marketing and branding materials directly from the city itself as their analysis will build insights on how the KAEC brand is being developed and linked to the message communicated to the public.

While informative, this analysis can only answer the question of what is happening regarding the development of place branding but not how and why. To answer these additional questions, the study needs to delve deeper into the driving forces behind both public and private actors involved in the process and how the general public has responded to these efforts through in-depth semi-structured interviews. Finally, appropriate testing measures must be put into place to validate the data and guide in adjusting the conceptual framework developed in chapter 4. Because of the subjective nature of the study, the use of multiple research methods is recommended in the literature as it will give validity to the research and adds strength to the findings and conclusions that were made (Bryman, 2015; Yin, 2014). Therefore, the selected research methods identified for this study can be summarized as follows:

1. Collection and analysis of visual representations.
2. Archival search and analysis of public media.
3. Semi-structured qualitative interviews and their analysis.
4. Focus group.

With the research strategy and research methods in place, the following section outlines the implementation of the study and how the data was collected and analysed.

5.4 Research Design

The decision to use a case study design methodology is due to the unique nature of the research and the complexity involved in the branding of urban form. This allows the research to first understand behaviour in this specific social context and secondly to explore these behaviours over time as they are created, develop, and transform (Bryman, 2015). The design structure first began with an initial pilot study to inform the other methods used in the study. It further investigated the process of branding from the perspective of both public and private partners involved in the development of KAEC. The next stage of the research design involved the collection of both branding representations and an exploration and analysis of local print and social media. Both stages acted as a foundation for the design of the semi-structured interviews by identifying main themes, influences and actors in the process. Finally, a focus group was

used as a means to test the results and adjust the conceptual framework developed in chapter 4. The four stages of the research design outlined above can be summarized in the following graphic:

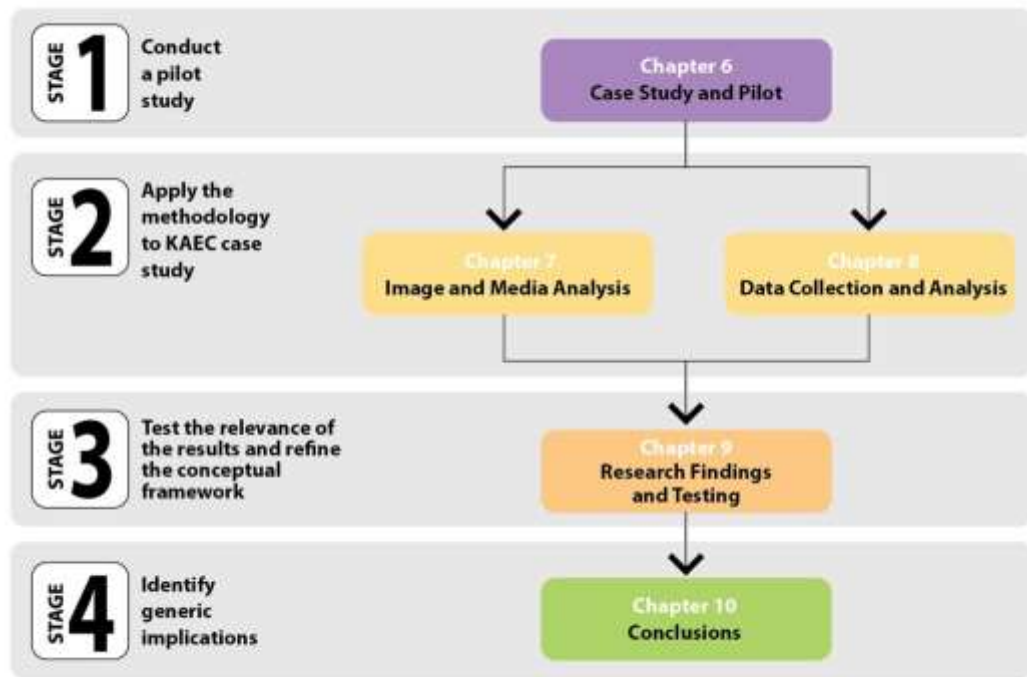


Figure 5-1 The four stages of the research design

All stages are outlined in detail in the following sections.

5.5 Stages of the Study

Stage 1: Pilot Study

The starting point of this process was the implementation of a pilot study at KAEC to secure the cooperation of all entities involved in the research, as until this point only informal verbal commitment for involvement and assistance was given. The second goal of the pilot study was to build a better understanding of the existing place branding process in Saudi Arabia's new city initiatives and in the KAEC project specifically. The third goal was to collect representations used to build the KAEC brand and to secure approval for their use in the study. Finally, the pilot study was used to test the methodological approach and the research methods.

The pilot study was completed from the 9th to the 25th of September 2014 through site visits to KAEC and nine (9) semi-structured interviews with the entities directly driving the development and branding of the project, namely the Saudi Arabian government and the private development partner involved in the development of KAEC. The pilot study accomplished all three goals and was used to provide focus to the to the following methods used in the study and is detailed in chapter 6 of this research.

Stage 2: Image Representation Analysis and Public Media Analysis

The images collected from KAEC were analysed using a visual-semiotic approach to interpret the different messages, key themes, and concepts embedded in the promotional elements (Bryman, 2015; O'barr, 1994). This includes exploring the meaning of place and its significance to people and how this is reflected in the way identity and brand is developed. The research then linked these messages to existing place branding elements identified in the literature review and different actors involved in the process.

Additionally, an archival search and analysis of public media was undertaken covering both print and social media. Print media data was acquired directly from the Arab News newspaper's online database and was structured based on thematic analysis (Bryman, 2015). To identify social media trends, an exploration of Saudi Arabian social media trends and usage was first undertaken. This was followed by a review of various 'Topic Detection and Tracking' (TDT) tools and their relevance to the study. From this review, twitter was identified as the primarily source for social media interaction in the country. The justification for this selection can be found in section 7.4 of this research. Additionally, the social media analytics tool 'Topsy' was initially chosen to identify trends in the KAEC brand on the twitter platform but as the platform was unavailable at the time of the analysis, the study used a combination of three tools to achieve similar results and gauge how and to what extent has twitter been used to support the creation of the brand. These tools are twitter's advance search function, twitonomy, and finally tweetreach. The secondary data collected by both tools and their analysis will be used to gauge KAEC brand awareness and levels of infiltration into local society. This analysis and its results are outlined in chapter 7 titled 'Image Representation and Media Analysis'.

Stage 3: Semi-Structured Interviews Analysis

Yin (2014), details the importance of both observation and interviewing when using a

case study research methodology. For this study forty (40) semi-structured interviews with different actors were conducted, each lasting approximately thirty (30) minutes. The number of participants was based on the top-down nature of management in both the government and private sector that is prevalent in the area and allows little public involvement, as was reaffirmed by the pilot study outlined in chapter 6. Interviews were conducted in either English or Arabic and were transcribed if permission was given to audio record them, otherwise notes were taken during the interviews. When conducted in Arabic, the interviews were translated into English by the researcher who is fluent in both languages.

The objective was to understand the process of place branding in the city project from the perspective of different actors. As the city is in the early stages of development, emphasis was placed on key actors in the decision-making process who guide the creation of branding. Because the study focuses on the social construction of concepts, the meanings behind the brand and its evolution are directly linked to the physical urban form being developed as well as the policy that drives it (Hague and Jenkins, 2005). It was therefore important to understand the degree of power wielded by different actors in the process and the relationships between them. Four main themes that shape the place branding process were identified and were used to construct the semi-structured interview questions. They are:

1. Identification of actors.
2. Place branding strategy development.
3. Influences on the branding strategy (political, economic, religious, and socio-cultural).
4. Brand authenticity and awareness.

During the pilot study and through the media analysis, the actors driving the development and branding of the project were identified. These were government and the private development partner involved in the development of KAEC, and secondarily end-user stakeholders residing in KAEC or in Jeddah, Saudi Arabia, the closest major city to the case study site. Using actor-network theory as a lens to study the development of place branding helped the study explore all possible major actors, sometimes with differing and contradictory interests and giving them equal value in the analysis. Identified human

actors are outlined in more detail in the following sections.

1. Government and the private development partner

Government agencies and the private development partner involved in the development of KAEC identified from the public domain were asked to discuss how identity and brand are developed and who are the different actors involved in the process. All interviews in this segment were pre-arranged and conducted in the offices of the participants with the permission of their organization or company or at a public coffee shop. They include the Saudi Arabian Investment Authority (SAGIA), the initial entity responsible for the planning and development of the economic cities, The Economic Cities Authority (ECA), and EMAAR the Economic City (EEC), the private development partner for KAEC. All contact information was collected from the public domain and selected individuals were initially contacted via email with all relevant information and consent forms attached. Audio recordings of the interviews were requested but unfortunately permission was not given. Therefore, notes were taken during the interviews. The questions asked during the semi-structured interviews are as follows:

1. How is the KAEC brand identity being developed?
2. Are there different identities being developed for different targets (local vs. international investors)?
3. What are the main components of the KAEC communicated branding message?
4. What are the main messages/representations that are being used in developing KAEC's brand?
5. How are Saudi Arabian social and cultural issues being addressed in the development of KAEC's brand?
6. Do you believe that the brand message developed for KAEC is representative of cultural and religious values of Saudi Arabia and how?
7. Who are the main actors and networks involved in developing KAEC's brand?
8. To what degree does politics or religion as opposed to economic growth affect the branding of KAEC?
9. On what basis are decisions regarding creating a brand for KAEC being made?
10. Are end-user stakeholders involved in the development of KAEC's brand?
11. What are the most important issues that should be involved in developing a brand for a new city?

12. What have been the main difficulties you experienced in developing KAEC's brand?
13. Has there been any cultural or religious resistance to the brand developed for KAEC?
14. Is the KAEC brand inclusive of all future residents of the city?

2. End-user Stakeholders

A cross section of individuals living in KAEC and in Jeddah, the closest major city, were asked to discuss their views on how they perceive KAEC's identity and brand. They have additionally been asked about mediums and representations they have been exposed to that have been used to build these opinions, and who are the main actors they think are involved in the process and why. Interviews were conducted in a public coffee shop or a hotel lobby and included businessmen, contractors, academia, residents of the city, international investors, and representatives from local groups. The questions asked during the semi-structured interviews are as follows:

1. What is your opinion of King Abdullah Economic City (KAEC) as a mega project in Saudi Arabia project and how does it compare to other projects in the area?
2. What marketing elements have you been exposed to that helped you build this opinion of KAEC?
3. Do you feel that the branding efforts of KAEC have developed a realistic representation of the city?
4. What are the main messages, representations/images or sources of information that come to mind when you think of KAEC?
5. What are the main positive and negative impressions/elements that you have of KAEC?
6. Who do you think are the main actors involved in developing KAEC's identity?
7. To what degree does politics or religion as opposed to economic growth affect the branding of KAEC?
8. Do you believe that end-user stakeholders are involved in the development of KAEC's brand and if not how should they be included and to what end?
9. Do you believe that the brand identity developed for KAEC is representative of cultural and religious values of Saudi Arabia and how?
10. If you don't agree with the present brand identity developed, what would you

prefer to see?

11. Do you feel that all segments of the society are represented in the branding efforts of KAEC? If not, do you think their inclusion will strengthen or weaken KAEC's brand identity?
12. What would you include or exclude to make the image of KAEC stronger/more positive?
13. Do you believe that KAEC has developed a strong/positive city "Brand"?
14. Would you invest or relocate to KAEC when it is further along in its development and why?

During the first phase of data collection, (15) interviews were conducted in January 2015. The remaining (25) interviews were completed in August 2015. Because Saudi Arabia is conservative in nature, the interview structure was designed with cultural and religious considerations in mind by following local norms in meetings and interaction with female participants. That said, the main relevant issues to the study were discussed honestly and with little restraint as the goal was to help further the success of the country and did not include any political or religious agendas. Audio recordings of the interviews were requested and most participants in this category agreed to be recorded. The semi-structured interviews, analysis, and results are outlined in chapter 8 titled 'Primary Data Collection and Analysis'. Detailed participant information is provided in the beginning of the chapter and all relevant forms can be found in Appendix 1.

Stage 4: Consolidation of finding and testing of results

The resulting conclusions from the analysis of imagery and the exploratory fieldwork study were consolidated into a set of key findings and were then tested using a focus group that included participants representing government, the developer, and academia/consultants. Initially six participants agreed to participate in the focus group but two cancelled at the last minute. Later phone interviews with both participants were conducted and their input to the main finding were included in the main discussion. The specific information on the selection of participants and their varied backgrounds and the focus group setup are detailed in the findings and testing chapter (9.4). This is a shift from the original methodology that proposed the use of a questionnaire to test the results as it was found that the general public had very little awareness or understanding of the KAEC brand or the branding process making the method irrelevant to the study as the

focus is on understanding the development of the branding process as opposed to gauging personal sentiment on brand strength or awareness. The testing and adjustment process is outlined in chapter 9 titled “Research Findings and Testing”.

As the research methods and the stages of the research have been detailed above, the following sections explain and justify the use of specific methods of qualitative data analysis, the ethical considerations of the study and finally the research validation process.

5.6 Qualitative Data Analysis

Thematic analysis is considered a widely-used method for qualitative analysis in social studies (Guest, 2012). Braun and Clarke (2006:78) consider it is a “foundational method for qualitative analysis” that is used as “a method for identifying, analysing and reporting patterns (themes) within data” (Braun and Clarke, 2006:79). This is accomplished by following a six-step process which includes becoming familiar with the data, developing initial codes, linking codes to themes, reviewing the themes to make sure they relate to specific extracts and the complete data set being studied to reach a final set of refined themes, and finally produce an analytical report (ibid). The software program ‘Dedoose’ was selected and used to assist in the coding of the data as opposed to using NVivo, the industry standard, as it was more intuitive and visual in nature. Dedoose’s analysis is based on ‘Code Charts’ that show relationships between different elements such as code counts and co-occurrence, descriptors, media, and frequency, as well as a code weight function that allows a user to distinguish between strong and weak impression under one code that allows building more depth into the analysis.

While two main types of thematic analysis can be used in qualitative research, this study focused on an inductive method which codes data without preconceived theories or assumptions to build new theory. Furthermore, themes are identified on two different levels; semantic, which focus on the direct statements of participants embedded in the data, and the latent level that takes a more in-depth look at the underlying meanings that can be inferred from the statements reported in the interviews. While thematic analysis has disadvantages due to its subjective nature that questions the reliability of the results (Guest, 2012), when used properly it allows researchers to explore social constructed

meanings and concepts in greater depth and infer information that is data driven to build insight on areas of knowledge that lack existing theory (Bryman, 2015).

5.7 Ethical Concerns

The fieldwork data collection process has received full approval by the ‘Research Ethics Committee’ at Oxford Brookes University. Only adult participants were recruited by email via a list that was created from the public domain such as the websites of related government agencies and the private development partner. Key community figures in Jeddah were identified from the media as well as from university and business directories. Emails were then sent to individuals explaining the research project and outlined issues of confidentiality and anonymity (see Appendix 1 for the introductory email, participation information sheet and consent form). After receiving a positive reply to the introductory email, a follow up email or phone call was made to agree upon date, time, and location for the interview. Additionally, if requested, transcripts or notes were sent to the participants after the interview and a summary of the findings will be sent after the study is concluded. The research involves “de-identified samples or data” that uses codes instead of names as some people in Saudi Arabia are not comfortable with being quoted or recorded. That said there is no potential risk to participants as the research focuses on business related topics. Finally, all the information in the field was encrypted and placed on a password-protected device. Additionally, an encrypted backup copy of the data was periodically uploaded to a secure and password protected Google online data storage that is associated with the Oxford Brookes University email account.

5.8 Research Reliability, Replication, and Validity

Bryman (2015) lists reliability, replication, and validity as the three main criteria for the evaluation of social research and to achieve trustworthiness and authenticity. Trustworthiness is further broken down into four criteria; credibility, transferability, dependability, confirmability (Guba and Lincoln, 1994). In relation to this study, credibility is achieved through the use of multiple sources of data or triangulation. As mentioned earlier in this chapter, by using a mixed method methodology the research strengthens its findings and conclusions and thus it’s trustworthiness. Additionally, all phases of the research have been documented and the researcher is aware of the possibility

of bias or personal values or ideas contaminating the research findings. To further strengthen the study, results were tested through a focus group with key actors and academics. From the perspective of authenticity, the study uses an ANT theoretical lens that adapts the principle of generalized symmetry that gives equal value to all actors in the network as mentioned in chapter 4. By tracing the links and interactions between the different actors that create the KAEC brand, the research attempts to build a clear and fair case of authenticity. Through the analysis, various viewpoints are considered equally and highlighted in an attempt to explain the creation and development of new city brands and how they can be better developed and managed. Collectively all factors mentioned above will add reliability to the research and strengthen the ability for replication.

5.9 Conclusion

This chapter has used the conceptual framework outlined in chapter 4 to develop a research strategy to study place branding in Saudi Arabia's new cities. Particular attention was placed on justifying the use of a single case study. Furthermore, it set a methodology for the implementation of semi-structured interviews, qualitative data analysis, and testing. It then went on to cover the ethical and validation issues that directly relate to the research. The use of multiple methods of inquiry were required to address the complexity of the situation and the limited existing theory available on the topic of branding new cities in Saudi Arabia. The next chapter will further this discussion by outlining the KAEC case in detail. The chapter also includes a review of the pilot study and analysis that was used to inform the image representation analysis and the semi-structured interview method of inquiry.

Chapter 6 The KAEC Project Case Study and Pilot

6.1 Introduction

As mentioned earlier in this study, the research focuses on the development and branding of Saudi Arabia's new city initiatives. These projects, referred to as economic cities, are being used to develop economic diversity, attract foreign direct investment (FDI), provides jobs and homes for the country's growing population, support national economic reform strategies, and finally as incubators for new policies and approaches to diversification and socio-cultural change. Furthermore, they are based on a public/private partnership (PPP) model where government provides regulation, support and supervision, and private developers finance, manage, and promote the projects. As explained in the methodology, the King Abdullah Economic City (KAEC) project spearheads four of the initial six cities planned for development in the country. As it is the only project that has gone past the planning stage, it was selected as the case study for this research as it represents both a critical case and is representative of the new city developments in Saudi Arabia. The following sections identify key aspects of the project's development, management, and branding in preparation for its use in the data collection and subsequent analysis. Information was collected from press releases, reports, and interviews with key public and private actors in the project.

6.2 King Abdullah Economic City

The King Abdullah Economic City (KAEC) project is located on the West coast of Saudi Arabia, directly on the Red Sea and approximately 100km north of Jeddah, the main commercial hub of the country.

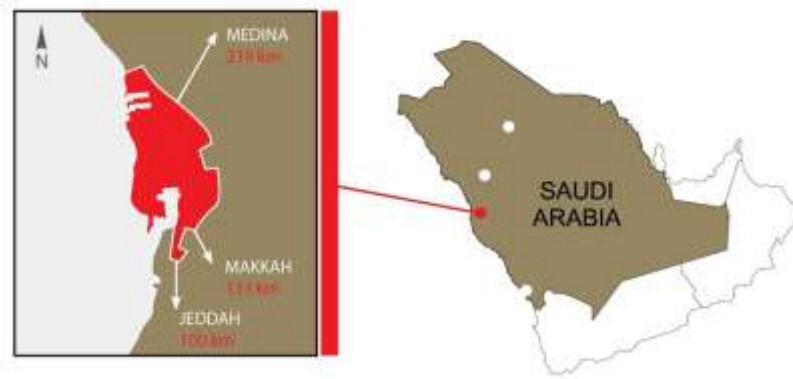


Figure 6-1 KAEC Location Map (authors own)

The project was planned to be a global logistics hub linking the Red Sea to the Persian Gulf through a private port and high-speed rail network that acts as a land-bridge for trade. It also seeks to develop various manufacturing sectors including oil based industries, consumer goods, pharmaceuticals, and automotive. KAEC is also planned to be a sustainable smart city with green buildings and high-tech city management systems. The city seeks to build competitive advantage through its strategic location on the Red Sea, the development of world-class infrastructure, access to low-cost energy, a strong business environment, and finally a modern lifestyle (KAEC, 2014). The project has a total development area of approximately 180 square kilometres and is being developed as a public/private partnership between the Saudi government and EMAAR, The Economic City, the master developer of the project (ibid). The goal of the city is to diversify Saudi's oil-based economy by attracting investment, while providing jobs and places to live for the country's growing population. The city is segmented into four main components; a downtown business district, an industrial zone, residential communities, and a seaport (ibid). It will also be linked to the main cities of Jeddah, Makkah and Madinah through a high-speed rail network. KAEC is being privately financed through a public stock offering and was initially expected to be completed by 2025 but has pushed back this target to 2035.



Figure 6-2 KAEC Master Plan showing planned and under construction elements

(Adapted with permission from KAEC Master Plan, authors own)

The starting point for the data collection and analysis was the implementation of a pilot study at KAEC as detailed in section 5.5 of the methodology and is discussed in the following sections.

6.3 King Abdullah Economic City Pilot Study

The KAEC pilot study focused on two governmental organizations involved in the development of Saudi Arabia's new economic cities; 'The Saudi Arabian General Investment Authority' (SAGIA) and later 'the Economic Cities Authority' (ECA). Additionally, KAEC's private partner, 'EMAAR, The Economic City Company' (EEC) was responsible for the development of the project. Through meetings with the marketing team at EEC, and representatives from SAGIA and ECA, the researcher was able to build a clear sense of the development and a better understanding of the place branding process being used at KAEC. The pilot study focused on understanding how the city is being developed through the perspective of both public and private partners, the decision-making and place branding process, and the different stakeholders involved. This was done through nine (9) semi-structured interviews with representatives of SAGIA, ECA, and EEC as follows:

Name of Entity	Category	# of Participants	% of total Participants
SAGIA	Government	2	22.5
ECA	Government	2	22.2
EEC	Private Developer	5	55.5

Table 6-1 Government and Private Partner Participant Details

As audio recordings were not permitted in the interviews, notes were taken, limiting detailed coding. That said, the main points discussed with the different stakeholders resulted in a set of clear themes regarding the main aspects of the development and branding from their perspective. The primary findings of the pilot study are as follows:

6.3.1 Project Governance

The Saudi Arabian General Investment Authority (SAGIA), established in 2000, is a governmental body that reports to the Supreme Economic Council. The main objective of the authority is to oversee and support the investment environment of Saudi Arabia, including both domestic and foreign investment. This involves preparing state policies designed to promote and enhance investment as well as monitoring and evaluating investment performance (SAGIA, 2014). SAGIA was initially responsible for the supervision of the new economic cities being planned and developed in the country and was involved in the initial branding of these cities. It focused on attracting foreign investment and providing a competitive business environment but placed less effort on developing the local or international brand of the cities. Policy at the time mandated that effort should be directed at King Abdullah Economic City (KAEC) as the attempt to develop the six planned cities simultaneously was found to be unattainable since they competed with each other for international investment. Policy later expanded to include the Jizan Economic City (JEC) and the very small Knowledge City in Madinah, which was more of a SEZ in the existing city of Madinah than a complete new city. Each project was entirely planned, developed, and operated by a master developer from the private sector. These master developers were responsible for the full range of city development activities such as building infrastructure and ensuring the sustainability of the city's growth by attracting investment and jobs with the support of SAGIA and later ECA.

Though investment packages were developed during the beginning phases of KAEC's development, they quickly became obsolete as policies and regulations continually changed. Focus was on direct marketing to foreign investors through foreign embassies, trade delegations, and established business relationships with existing multinational companies. While Saudi Arabia's national image abroad was still seen as being very negative, the launch of the new city initiative was near enough to the worldwide financial crash to attract investors that were looking to expand into the more stable and quickly growing markets of the Middle East. Much effort was placed by SAGIA on international business rankings such as the 'ease of doing business index' and opening up the country to foreign direct investment through new regulations and incentives such as inexpensive energy and low-cost expat labour. The new cities therefore attracted oil, manufacturing companies, and international pharmaceutical firms that were looking to expand into Saudi Arabia for financial reasons. Moreover, the existing cultural and religious aspects of the country or even local perceptions of the cities themselves had little to do with the decision to invest. Many of these companies were based in the less conservative UAE and only saw Saudi as an investment opportunity and were not interested in supporting the city's community development efforts.

Locally the new cities were promoted through regional Real Estate exhibitions such as Cityscape (figure 6-3), media press releases, and articles in the daily newspapers. However as little brand management was conducted from either the government or private partners, the message being communicated to the public reflected both the positive and negative aspects of the project's performance including the \$1.3 billion bailout during the first phase of the project in 2010. This lack of control and coordination reflected badly on the project and resulted in a lack of confidence in the project from the general public.

IMAGE REMOVED FOR COPYRIGHT REASONS

Figure 6-3 Exhibition Booth (KAEC, 2014)

Though various other promotional elements were used to build the city's brand, they were localized around the cities themselves in the form of lifestyle billboards, a massive entrance gate, and onsite showrooms that can only be accessed by invitation. Billboards at the entrance to KAEC for example were not maintained over time and were left to the elements during the first five years of the project. Recently with the new push to rebrand and promote the city, they have been removed. Local focus later moved towards the marketing of KAEC's first physical product, the first phase of the BayLaSun ocean-front apartment project and the BayLaSun business park. The promotional elements included city-wide advertising billboards and property sales events at luxury hotels in the major Saudi cities of the country, as well as newspaper advertising and increased PR. Though high prices have deterred many investors, many Real Estate speculators and international companies bought into the project. BayLaSun was also the first strong local drive to promote the city locally and linked the product offering with improving the image of the city.

IMAGE REMOVED FOR COPYRIGHT REASONS

Figure 6-4 Aerial View of the BayLaSun Project (KAEC, 2014)

In 2014, various new products were launched including villas in two developments and a subdivision of residential plots. While response to the offerings has been quite positive with strong sales, there has been mixed signals about their success as viable investments. Although EEC has shown progress in developing infrastructure for the city, reports from users have commented on high prices and few options for basic services. Promises being made by the city were not always kept, leading to the loss of trust of those who have invested in the city be they individuals, businesses, or international companies. Still progress on the ground is beginning to be seen. Factories are being constructed and a section of the first privately owned port in the country is now operational. The Saudi government is also building a large-scale rail station on the edge of the city to support the city's development and to link KAEC to the rest of the country.

IMAGE REMOVED FOR COPYRIGHT REASONS

Figure 6-5 Aerial View of the Industrial Valley and Port (KAEC, 2014)

IMAGE REMOVED FOR COPYRIGHT REASONS

Figure 6-6 Aerial View of the KAEC Rail Station, KAEC (2014)

Nevertheless, the success of Saudi Arabia's new cities comes down to the issue of credibility, both domestically and internationally, an element that is the cornerstone of any branding process. Locally the initial strategy of EEC was to push the concept of change and development on a massive scale, promising a working city, new jobs, and homes in a very short amount of time, a goal that was not achievable or realistic but reflected the country's quick push towards change and improvement under the new

leadership of King Abdullah. This strategy led to a lack of confidence that the city could function as envisioned with little tactic in place to dispel these fears. Adapting the Dubai development model mentioned in chapter 2 was also a big factor in unsatisfactory initial performance of the project. EMAAR, the mother company of EEC is an Emirati company that was accustomed to an open business environment in a country that had already taken strong steps to embrace globalization. Ease of entry and property ownership for individuals also helped projects in Dubai tap into international investment both on a business and individual level, something that did not exist in Saudi Arabia.

From another perspective Dubai focused on individual projects set in a city that already had supporting services, businesses, and jobs. These projects also charged higher prices for their products as they were targeting international high net-worth individuals looking for second homes in a modern and liberal location that gave them access to residency. Massive marketing and sales efforts, until then unheard of in the area, as well as Dubai's Real Estate boom drove these projects and led to their initial and ongoing success, which was only disrupted by the global financial crash of 2008. While very effective in Dubai, this model did not work well in Saudi Arabia. Due to local freehold ownership regulations and restrictions, only Saudi and GCC nationals and locally registered international companies were allowed to buy into these projects, and only with certain limitations. Saudi investors also found it very difficult to justify investing in a city that is just starting to be developed and that is promoting Real Estate products at similar prices to those being sold in Jeddah, the nearest major city. Additionally, the city's projects were new endeavours that did not have any basic services or accessibility to jobs in place. Internationally SAGIA and EEC did not take into account the unique and very conservative nature of Saudi Arabia as well as its negative image abroad. Companies that took the risk and bought into the cities found that business and labour processes were not yet efficient or were continuously changing as the government attempted to adapt to a more open business environment. They also found that services were expensive and very limited with a trip to the closest major city an hour and a half away. These factors created a major credibility issue with the development of Saudi Arabia's new city projects and culminated in the aforementioned \$1.3 billion KAEC bailout by the Saudi Government.

To address credibility, the Saudi government created the Economic Cities Authority (ECA), which was a separate entity that focused on creating innovative and competitive

new cities for Saudi residents to live. The ECA took over the supervision of the economic city initiative from SAGIA in 2010 with the hope that a more specialized focus would drive investment and growth in these projects. ECA looked to develop partnerships, progressive investment, and development regulations, and a 60X24X7 structured e-government service initiative (sixty minutes, twenty-four hours a day, seven days a week processing) that would be used to attract investment and makes doing business in Saudi Arabia's new city projects easier and more efficient (ECA, 2014). Essentially the ECA was assigned the responsibility for the operational supervision of the new cities including all governmental services and branding. That said, other than involvement from an economic and regulatory standpoint, the ECA has said they have done nothing to help develop branding strategies for these new cities either domestically or internationally. Their focus has been to develop and promote the 60X24X7 initiative, which is presented separately from other branding elements during investment pitches. But regulations and shifts in policy alone cannot build credibility; effort must be made to properly implement these regulations through EEC. Furthermore, little is being done to improve the image of the Saudi Arabian nation brand that is directly linked to the success of attracting international investment to these projects. Again without positive change on the ground, little can be done to change the country's image abroad.

EEC on the other hand is well aware of the importance of place branding and has taken steps to develop a branding strategy for the city. The main focus of their strategy is to move from the initial 'big promise' strategy mentioned earlier in this section to concentrate on developing achievable goals referred to as 'small promises'. This has mainly revolved around product development and sales, which incorporate place branding elements for KAEC itself in the investment message. The city's existing products are either business investment oriented such as the King Abdullah Port and the Industrial Valley or one of five residential communities that are being developed and sold as finished units or plots of land that include a labour housing solution.



Figure 6-7 Al Shurooq Project construction site (Author's Photo)

6.3.2 KAEC Marketing and Branding Efforts

The marketing and branding efforts for city elements are a direct result of KAEC's own initiatives and do not involve either SAGIA or ECA in the decision-making process. Internally decisions regarding marketing, sales, and branding are made directly by higher management via a top-down approach with specific details being controlled by a relatively small EEC marketing department. Management, without any directives from the EEC, has adhered to the country's strict advertising policies such as the use of modestly dressed women in their advertising. This has shown a strong understating of local policies and cultural norms by KAEC's marketing team. On another front, the marketing team reported that different identities are being used to target domestic and international investors, though little depth can be seen from the marketing materials. That said, city branding has been linked to the marketing and sales of individual products and is not yet being developed separately. The city itself has moved on from the bailout in 2010 and is starting to increase its revenues from investment in its business and residential properties. As of 2014, ECC has reported that 2,500 residents are living in the city that now includes a school, a clinic, a hotel, numerous shops and a branch of a major supermarket. Unfortunately, this number has not been verified and no breakdown was given when asked, casting doubt on its validity.

2014 has proven to be a turning point for the marketing efforts of KAEC with renewed focus on place branding. The city has developed a new visual identity that is linked to its products under the slogans of ‘Moving Forward’ that highlights the progress of the city and ‘Life as it could be’ focusing on portraying the city project as an efficient and modern alternative while addressing the prevalent sense of disappointment shared by many Saudi Arabian nationals on the state of existing cities in the country and the issues faced by KAEC in the past. The identity itself consists of a reworked city logo and unified theme for all city elements. Each product now has a unique logo and brochure that starts with a lifestyle segment with the aforementioned slogan and imagery that showcases the main services being provided by the city.

IMAGE REMOVED FOR COPYRIGHT REASONS

Figure 6-8 Al Waha Promotional Materials (KAEC, 2014)

The following image shows the main lifestyle theme used in all residential products that mixes elements of development, family, and leisure in the holistic image of the city.

IMAGE REMOVED FOR COPYRIGHT REASONS

Figure 6-9 Main Lifestyle Theme (KAEC, 2014)

Additionally, EEC has started to develop various elements to support KAEC's brand identity, these include a bi-lingual digital community magazine called 'Huna' in Arabic or meaning here in English, a community app, a branded bus that transports EEC employees living in Jeddah to and from the KAEC project, a web portal for community involvement, and participation in the Saudi national day celebrations and community events. The use of both English and Arabic in its apps, websites and publications reflects the international target market for the project and are used to highlight investment achievements as well as activities. That said, content is still completely controlled by EEC and can be perceived as being bias towards the project. Additionally, an international city development summit and a periodical one-day forum on investment held in the city were also developed to increase international and investment exposure. EEC has also started to host various social events such as the BayLaSun weekend initiative and a Harley Davidson event to develop word-of-mouth advertising for the city. The weekend initiative invites local groups, potential investors, and students and staff from the nearby international research university King Abdullah University for Science and Technology (KAUST) to a day of activities and food on the beach. The event attracts approximately 70 to 200 residents and visitors and is being used to introduce people to the city while building atmosphere for existing residents. The Harley Davidson event encourages groups of riders from Jeddah to visit the city and build an atmosphere of excitement and vibrancy. Generally, the strategy has been to develop advocacy through word of mouth and slowly build a perception of an active city in preparation for the launch of a planned local place branding strategy that has yet to be developed or implemented.

6.4 Conclusion

The pilot study has shown that there is much to learn from exploring the development of the KAEC brand during different periods of governance and control. In regard to the development of the brand identity itself, information gathered during the pilot study has shown that there is a strong top-down management structure in the development and branding process that limits the participation of other stakeholders in the decision making or brand development process. Therefore, more effort should be made to explore the networks and actors that are or can be involved. In summary, data collection and analysis should take into consideration the following points:

1. As the different phases of the project's management and branding were highlighted in the interviews, promotional elements should be collected from each phase and linked to the actors involved in their development.
2. As the pilot study clearly identifies shifts in the management of the KAEC brand, more focus should be placed on exploring how the city brand was developed and perceived during these periods.
3. Semi-structured interview questions with government entities should focus on what they think of the brand developed by EEC as the pilot study showed their limited involvement in its development and implementation.
4. The pilot study has highlighted the need for a deeper understanding of different networks and actors that are involved in the creation of the KAEC brand.
5. A before and after focus should be adapted in the semi structured interviews to reflect the situation before and after the government bailout of the project.
6. There should be more focus on understanding the credibility issue of KAEC and the parties behind its development as little justification for actions or facts were given during the interviews.

Chapter 7 Image Representation and Media Analysis

7.1 Introduction

As mentioned in the methodology chapter, the research primarily focuses on the social construction of the KAEC place brand. This means that the actual identity of the city is slowly being developed over time through image representations and textual discourse until the physical and social form of the city takes shape. Furthermore, this identity has been developed with a certain goal through the agency of key actors in the development process. Analysing these constructed messages and representations was the first step in addressing how the development of place branding occurs in the KAEC project and how it has performed. It also guided the research in exploring the driving forces behind the decisions of both public and private actors involved in the process and their motivations.

Bignell (2002) stresses the need to use both interviews and media analysis to understand how image is constructed, something that is directly related to the creation of brand identity in places. Therefore, the study of the KAEC projects image representation and an exploration of local print and social media will act as a foundation for the development of the interview segment of the study. This was accomplished by identifying the main themes, influences, and actors that are involved in the process. By focusing on how messages are symbolized and are connected to each other, Bignell (2002:30) shifts focus to the positioning of audiences and how they “shape and lend significance to our experience of reality”. The ultimate goal of media is to engage the audience in decoding and accepting certain beliefs put forth for a specific reason or reality. But this process is not straightforward, complex levels of symbolism can be lost on some audiences and can lead to signifiers being falsely interpreted in a way that could conflict with the agency that created them.

The image representation and media analysis used in this study explored the connection between the messages that have been developed for the KAEC project and the meanings they signify. While EEC, has developed a wide variety of messages that target different stakeholder groups, the study will only look at messages that have been communicated through mass media to the Saudi Arabian general public as opposed to messages,

activities, and media that are not directly accessible to the public if not sought out by interested parties. Therefore, elements like videos, brochures, presentations, and events at KAEC have not been included in the image and media study as they are targeting a specific segment of people and are not being communicated directly to the public. Finally, the study will further focus on three different periods based on key shifts in branding strategy identified through interviews with government and EEC actors during the pilot study. They are the launch of the city in 2005, the initial development of branding for the city project, which includes the government bailout from 2008-2010, and finally post-bailout redevelopment period from 2013-2015.

The chapter will first outline the process of image selection, categorization, and analysis using a visual-semiotic approach to interpret the different messages, key themes, and concepts embedded in the promotional elements targeting the general Saudi Arabian public. This includes exploring the meaning of place representations and their perceived significance to different stakeholders and how this contributes to the way brand identity is developed. The research will then link these messages to existing place branding elements identified in the literature review and to different actors involved in the process. It will then go on to analyse KAECs brand awareness in both print and social media. The data collected by both tools and their analysis will be used to gauge KAEC brand performance and levels of infiltration into local society.

7.2 Image Representation Analysis

Spencer (2010:240) stresses the importance of visual studies in highlighting social reality and how different mediums of representation all work in tandem to allow “a vivid and deeper examination of evidence”. Semiotics, or the study of signs, provides a set of tools for examining an image and exploring how it is translated into broader meanings (Rose, 2012). From the work of Barthes (1972; 1977), signs can be broken down into two distinct elements, a signifier and a signified. The former refers to the visual elements used to represent the latter through a specific concept or meaning. This study further focuses on symbolic signs that denotes a random and subjective relationship between the visual representation and its meaning. Furthermore, symbolic signs can also be connotative in nature as they could refer to a variety of higher-level meanings. These concepts have been studied in detail by Machin (2013), who finds that the analysis of images follows two

main stages; ‘denotation’ or what the image denotes or shows and is a way of looking at the individual elements in an image and ‘connotation’ which means identifying the meanings that are communicated by what is shown, how it is shown, and finally the actions or behaviours that are being depicted.

While there is a consensus that semiotic analysis provides a strong account of how images provide insight on the social construction of reality (Rose, 2012), this type of analysis is largely based on subjective interpretation grounded in assumptions made by a researcher through a small number of samples. Still there is merit in the use of semiotic analysis when used to reach collective conclusions and inform other analytical methods, especially in cases that involve the study of identity (Rose, 2012; Bignell, 2002). The goal of the visual study used in this research is therefore limited to aligning the identity being projected by EEC with the representations they are publicly communicated to their stakeholders in an effort to identify main themes and gauge the performance of the project’s branding efforts. Each image was allocated codes in the qualitative analysis program Dedoose based on the direct elements included in the representation, these codes were then grouped into themes. As well as the specific elements included in each image, an additional denotation element called ‘overall reflection of reality’ was included in the analysis to denote the overall level of authenticity. All Dedoose tables can be found in Appendix 2. The following sections detail the image analysis process for the aforementioned periods based on key shifts in EECs branding strategy.

7.2.1 KAEC Launch Period (LP), 2005

KAEC was first introduced to the public through official press releases and news reports, which included a small number of computer-generated conceptual renders of the city. The focus was on visionary statements that denote economic and social progress (KAEC, 2014). Themes mentioned in the media focused on the prestige, prosperity, and the reputation of the country with a strong economic focus, but with little mention of how the project will be implemented. During this period, three main images were circulated, each will be analysed in detail following Machin’s (2013) stages of denotation and connotation. They are as follows:

IMAGES REMOVED FOR COPYRIGHT REASONS

Image LP1

Image LP2

Image LP3

Figure 7-1 Images used during the launch period (KAEC, 2014)

These images represent the three categories of images that were released to the public at the launch of the project which are general cityscapes, detailed high-rise office district, and sport and leisure. These images were conceptual renders that were based on locations in the city's master-plan at the time of launch and are not real designs or projects. Each selected image was analysed in detail in the following sections:

a. Image LP1:

The image denotes an imagined cityscape of KAEC that includes residential, commercial, and leisure components such as parks, canals, and a marina. There are two clusters of buildings in the image as well as one iconic high-rise tower in the distance. It also includes a wide landscaped road network with bridges. From another perspective, the image highlights the location of KAEC on the sea and shows multiple marinas. Finally, the image shows the sunrise as a background. These elements and their connotations are outlined in the following table:

Denotation	Connotation	Higher Meanings
Cityscape	Proper planning, modernization, availability of services, well maintained city	Economic and social progress, urban development, national pride
Residential areas	Modern, luxury, green.	Quality of life
Business/office areas	Modern, glass towers, high density	Jobs, economic progress and diversification
Leisure areas (parks, canals)	Link to nature, family, health	Quality of life
Leisure areas (marinas)	Availability of leisure activities	Luxury; affluence
High-rise tower	Icon, national and global landmark	National pride
Road network/bridges	Proper planning, good services	Urban progress
Landscaping	Beautiful city	Quality of life; urban progress
Sea	Link to nature, views	Luxury; affluence
Sunrise/light	New, birth, clean	Economic and social progress
Overall reflection of reality	Believability	Authenticity

Table 7-1 Analysis of image LP1

b. Image LP2:

The second image is similar to the first representation but also places focus on the business element of the city. It denotes a conceptual multi-use cityscape with little detail connected to an island with high-rise business towers rendered in some detail. As in the previous image it includes street networks, bridges, marinas, and landscaping. The link to the sea is again very prevalent. These elements and their connotations are outlined in the following table:

Denotation	Connotation	Higher Meanings
Cityscape	Proper planning, modernization, availability of services, well maintained city	Economic and social progress, urban development; national pride
Business island/office areas	Modern, glass towers, high density	Jobs; economic strength; Urban development
Leisure areas (parks)	Link to nature, family, health	Quality of life, happiness
Leisure areas (public space)	Strong community, vibrant area	Quality of life
Leisure area (marina)	Availability of leisure activities	Luxury, affluence
Road network/bridges	Proper planning, good services	Urban development
Landscaping	Beautiful city	Urban progress
Sea	Link to nature, views	Luxury, affluence
Overall reflection of reality	Believability	Authenticity

Table 7-2 Analysis of image LP2

c. Image LP3:

The final image in the launch period is very different than the first two as it shows a very detailed sport stadium in the setting of a conceptual city. While showing most of the elements of the previous images including high-rise towers in the background, it also shows people engaging in leisure activities in an impressive setting linked directly to the sea. The image denotes a football match with spectators and people in the public areas around the building. A marina and sailboats around the building can also be seen. These elements and their connotations are outlined in the following table:

Denotation	Connotation	Higher Meanings
Cityscape	Proper planning, modernization, availability of services, well maintained city	Economic and social progress, urban development; national pride
Stadium	Modern, support of football	National pride
People	Strong community, vibrant area	Quality of life
Leisure areas (public space)	Strong community, vibrant area	Quality of life
Leisure area (marina, sail boats)	Availability of leisure activities	Luxury; affluence
Palm trees	Link to nature; Life; strength; bounty;	Saudi Arabian culture
Sea	Link to nature, views	Luxury; affluence
Overall reflection of reality	Believability	Authenticity

Table 7-3 Analysis of image LP3

From the themes extracted from the three images, eight major concepts were identified. They are (1) Urban Development, (2) Economic and Social Progress, (3) National Pride, (4) History and culture, (5) Quality of Life, (6) Luxury, Affluence, and Exclusivity, (7) Global/Western Outlook, and (8) Authenticity. The three images, as did others that were communicated to the public at the time of the city's launch, focused on showing a representation of a modern, internationally influenced city with little link to Saudi Arabia, its history, cultural, or religious values. The focus was on highlighting the shift from existing cities with substandard infrastructure, services and leisure activities to a higher standard of living and economic prosperity. As only an initial masterplan had been completed at this stage, it is understood that no detailed designs could be shown so the focus was on vision for the future. The code frequency of higher meanings that have been communicated from the images in this stage can be summarized as follows:

	Image ID: LP1 (frequency)	Image ID: LP2 (frequency)	Image ID: LP3 (frequency)	Period: Launch Period (frequency/weight)
Affluence/ Exclusivity	2	2	2	6
Authenticity	1	1	1	3
Economic and Social Progress	4	2	3	9
Global Outlook		1		1
History and Culture			1	1
National Pride	2	1	1	4
Quality of Life	5	2	2	9
Urban Development	5	4	3	12

Table 7-4 Launch Period Summary
(colour code: grey 1-2, yellow 3-4, orange 5-6, green <6)

The analysis highlights the launch period's balance between national economic, social and developmental goals while projecting a strong quality of life but neglecting history and cultural values. As can be expected in such an early stage in the development, authenticity is quite weak and has not been addressed properly.

7.2.2 Initial Development Period (IDP), 2008-2010

This period coincided with the global financial crisis and the subsequent government bailout of the city mentioned in chapter 6. EEC, the private developer, struggled to keep the project afloat as no revenue was being made at that time and the city was running low on funds due to planning and financing mistakes. During this period focus was placed on completing the first stage of the city's infrastructure and the first projects of the city. These consisted of the BayLaSun business and residential development area as well as a villa neighbourhood area. Though lifestyle elements such as happy families were included in brochures and in other media on-site, very little of that was directly communicated to the public. Instead a project-focused strategy was adapted that highlighted the smaller projects being developed with slogans such as "life is beautiful by the sea" and "live the future now" on billboards and in newspapers (KAEC, 2014). As the designs for these projects were completed, the imagery used was much closer to reality but still included elements that have yet to be developed such as marinas and public amenities. From the images that were being communicated to the public through advertising, three images were randomly selected, two from the BayLaSun business and residential development and one from the villa project. All three were analysed in detail in the following sections:

IMAGES REMOVED FOR COPYRIGHT REASONS

Image IDP1

Image IDP2

Image IDP3

Figure 7-2 Images used during the initial development period (KAEC, 2014)

a. Image IDP1

The first image selected for this period shows a render of the BayLaSun business area where EEC and many of the contractors working on the project were to be based. As the only office district in the project during the initial phase of development, there was little need to promote it except as an achievement for the city. It therefore follows what was

done during the launch period of the project but used the completed design of the area, which closely resembles what was later built (see figure 6-4). The main difference from the previous period was the shift from showing the city as the masterplan to actual projects. The image shows a detailed group of low-rise office buildings in a densely landscaped area that includes a monumental gate, water elements, and pedestrian walkways directly on a canal with a marina and boats. The open sea and beaches can also be seen in the background. These elements and their connotations are outlined in the following table:

Denotation	Connotation	Higher Meanings
Low-rise office buildings	Modern, glass towers, high density	Jobs, economic progress diversification.
Monumental gate	Link to past culture and history	Symbolic link to country/government protection. National pride
People	Strong community, vibrant area	Quality of life
Leisure areas (public space)	Strong community, vibrant area	Quality of life
Leisure area (marina, boats)	Availability of leisure activities	Luxury, affluence
Leisure areas (beach)	Availability of leisure activities	Quality of life
Palm trees	Link to nature	Life, strength, bounty, Saudi Arabian culture
Sea	Link to nature, views	Luxury, affluence
Overall reflection of reality	Believability	Authenticity

Table 7-5 Analysis of image IDP1

b. Image IDP2

The second image selected for this period shows a render of the BayLaSun residential area consisting of mixed-use low-rise apartment buildings on canals. The image also shows a landscaped pedestrian promenade with shops and restaurants and boat moorings overlooked by a restaurant terrace with tables and chairs. People are shown walking along the promenade and near and on boats. These elements and their connotations are outlined in the following table:

Denotation	Connotation	Higher Meanings
Low-rise residential buildings	Modern, nice views	Quality of life; lifestyle changes
Shops	Availability of services	Economic progress
Restaurant	Strong community	Quality of life
People	Strong community, vibrant area	Quality of life
Leisure areas (promenade, public space)	Strong community, vibrant area	Quality of life
Leisure area (marina, boats)	Availability of leisure activities	Luxury, affluence
Palm trees	Link to nature	Life, strength, bounty, Saudi Arabian culture
Canals	Link to sea, views	Luxury, affluence

Overall reflection of reality	Believability	Authenticity
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Table 7-6 Analysis of image IDP2**c. Image IDP3**

The final image in the initial development period shows a render of a landscaped residential street with semi-detached (duplex) houses with no walls. It also shows cars in the driveways and a lone cyclist. The exclusion of walls is of note as Saudi Arabian homes are usually walled to provide privacy that stems from cultural and religious values prevalent in the country. By not including walls the image gives the perception of a more international/modern environment. The cyclist is another interesting element. Though cycling is not popular in Saudi Arabia due to the weather, it seems to be included in the image to provide a sense that KAEC is not a typical conservative city, but somewhere more western. These elements and their connotations are outlined in the following table:

Denotation	Connotation	Higher Meanings
Semi-detached houses	Financial security, Affordability, Better future	Economic and social progress, urban development
No walls	Modern, western	Less conservative, lifestyle changes
Landscaping	Good services, maintenance	Quality of life
Palm trees	Link to nature	Life, strength, Saudi culture
Cyclist	Western environment	Less conservative
Cars	Good jobs	Quality of life
Overall reflection of reality	Believability	Authenticity

Table 7-7 Analysis of image IDP3

The three images selected for this period show a shift from conceptual images of the city and national economic, urban and social goals to real projects that were being constructed at the time. The images also began to show the more human side of the development focusing on places of work and future homes. There is also a move towards lifestyle changes that are less conservative and more international. That said, these projects were very generic in nature and could have been in any city of the world. They had no link to KAEC or to the country as ECC shifted focus from selling the concept of a city to selling products that were unaffordable to many potential residents. As the city at this time only consisted of these three projects and a few new factories, there was little reason to perceive the project as a city and the strategies and representations being used to promote KAEC did little to change this perception. The frequency of higher meanings that have been communicated from the images in this stage can be summarized as follows:

	Image ID: IDP1 (frequency)	Image ID: IDP2 (frequency)	Image ID: IDP3 (frequency)	Period: Initial Development (frequency(weight))
Affluence/ Exclusivity	2	2		4
Authenticity	1	1	1	3
Economic and Social Progress	3	2	3	8
Global Outlook	1		2	3
History and Culture	1	1	1	3
National Pride	2	1	1	4
Quality of Life	4	4	4	12
Urban Development	3	3	1	7

Table 7-8 Initial Development Period Summary
(colour code: grey 1-2, yellow 3-4, orange 5-6, green <6)

7.2.3 Redevelopment Period (RP), 2013-2015

After the bailout, ECC changed its strategy concerning KAECs branding. While still focused on city projects, it began to link these elements to the city through the slogans ‘moving forward’ and ‘life as it should be’. But this was mainly done onsite or at sales events while what was communicated to the public was in the form of branded advertising via newspaper and billboards in the main cities of the country and not individual images as done before. As more and more elements of the city were being completed such as the port and school, ECC was able to start building a brand identity for KAEC. Unfortunately, most of the focus was limited to events onsite without opening up access to the general public showing a large rift between the two groups. Images of the AlMaroug residential area that includes a golf course and Alwahah residential area were selected to represent this category and were analysed in detail in the following sections:

IMAGES REMOVED FOR COPYRIGHT REASONS

Image RP1

Image RP2

Image RP3

Figure 7-3 Images used during the redevelopment period (KAEC, 2014)

a. Image RP1

The first image selected for this period shows a sub-project in the AlMaroug residential area called AlShatee neighbourhood. The image shows landscaped luxury villas adjacent to a beach with umbrellas and beach chairs. There are people walking along the beach and along a wooden jetty. The complete advertisement also includes the KAEC and AlMaroug logos and a sales oriented tagline for buying a villa in a specific part of the project. It also includes contact information and the place and date of their sales event in a luxury hotel. These elements and their connotations are outlined in the following table:

Denotation	Connotation	Higher Meanings
Villas	Ownership of home	Privacy, exclusivity, quality of life, urban development
People	Strong community, vibrant area	Quality of life
Leisure areas (public space)	Strong community, vibrant area	Quality of life
Leisure area (jetty)	Availability of leisure activities	Luxury, affluence
Leisure areas (beach)	Availability of leisure activities	Quality of life
Palm trees	Link to nature	Life, strength, bounty, Saudi culture
Sea	Link to nature, views	Luxury, affluence
Overall reflection of reality	Believability	Authenticity

Table 7-9 Analysis of image RP1

b. Image RP2

The second image selected for this period is a part of the AlMaroug residential area called the Golf Village. While the advertisement promotes the sale of exclusive villas, the image shows a real photo of a landscaped golf course with a single Arab person playing golf. As with the first image in this period, it also includes the KAEC and AlMaroug logos and a sales oriented tagline for buying a villa in the Golf Village project. It also includes contact information and the place and date of their sales event in a luxury hotel. What is of note here is that very few Saudi Arabians play golf as maintaining such facilities are very expensive due to the cost of irrigation in a desert climate. The elements shown in the image and their connotations are outlined in the following table:

Denotation	Connotation	Higher Meanings
Golf Course	Luxury, exclusivity, success.	Western life, non-Saudi
Golfer	Young, successful	Quality of life
Landscaping (grass)	Good services, maintenance	Not a desert environment, not Saudi Arabia
Coconut Palm trees	Link to nature	Western culture
Overall reflection of reality	Believability	Authenticity

Table 7-10 Analysis of image RP1

c. Image RP3

The final image in the redevelopment period shows a real photo of a lightly landscaped residential street with semi-detached (duplex) houses with no walls. As mentioned earlier, Saudi Arabian homes usually are walled to provide privacy that stems from cultural and religious values of the country. By not including walls the image gives the perception of a more western/modern environment. The city also includes a father and son wearing Saudi Arabian traditional dress. The boy is also wearing a baseball cap and is pleased/smiling at the father. Similar to the other images in this period, the advertisement also includes the KAEC and Alwahah logos, a sales oriented tagline for buying a villa in the project, contact information, and the place and date of their sales event in a luxury hotel. These elements and their connotations are outlined in the following table:

Denotation	Connotation	Higher Meanings
Semi-detached houses	Ownership of home	Financial security, affordability, quality of life, better future
No walls	Modern, western	Less conservative, lifestyle changes
Landscaping	Good services, maintenance	Quality of life
People (father and Son)	Family, bright future	Quality of life
Overall reflection of reality	Believability	Authenticity

Table 7-11 Analysis of image RP3

The three advertisements selected for this period show a shift from rendered images to the use of real photos and people that give a stronger sense of authenticity to the development of the city. They also continue with the trend towards lifestyle changes that are less conservative and more western. However, the projects are still generic in nature with no links to KAEC and only weak links to Saudi Arabia such as the use of palm trees, and the Arab golfer and the father and son in traditional Saudi Arabian dress. ECC was still focussing on selling real estate products without placing much effort in building a strong public brand identity for the project. The frequency of higher meanings that have been communicated from the images in this stage can be summarized as follows:

	Image ID: RP1 (frequency)	Image ID: RP2 (frequency)	Image ID: RP3 (frequency)	Period: Redevelopment (frequency/weight)
Affluence/ Exclusivity	2	1		3
Authenticity	1	1	1	3
Economic and Social Progress	2	3	3	8
Global Outlook		2	1	3

History and Culture	1		1	2
National Pride	1			1
Quality of Life	5	3	4	12
Urban Development	2	1	1	4

Table 7-12 Redevelopment Period Summary
(colour code: grey 1-2, yellow 3-4, orange 5-6, green <6)

Image analysis from the three periods shows a clear shift from elements that represent core values of the city such as economic and social progress, national pride and urban development towards a more global outlook that focuses on luxury, affluence and exclusivity as well as increased authenticity, reflected by the development of smaller, and more attainable real estate projects located in the city. That said, all development periods of the project have been consistent on their focus on quality. Finally, all three periods have shown little consideration for historic and culture vales of the country.

It is clear from the analysis above that there are various shifts in the message communicated to the public during the three periods. The first shift is from a larger and more holistic national vision towards a sense of affluence, exclusivity, and a more global outlook. This reflects a move from branding on a city scale to city marketing practices that focus on sales to a specific segment of Saudi Arabia's population. From another perspective, there was little change over the three periods in development sentiment as well as authenticity. This reflects the consistent focus on physical, economic and social development and a consistent but weak level of realism in their messages. The image study also showed a constant, although weak, increase in messages that relate to history and culture meaning effort is being placed to adjust to the countries unique values. Finally, it is of note that while there are both positive and negative shifts in message sentiment the analysis shows that they are still very weak. Clearly more should be done to develop stronger representations that will increase sentiment impact and thus overall brand identity. The following section will expand on these themes through an analysis of public media.

7.3 Public Media Analysis

While content analysis is the typical method used in the quantitative analysis of documents (Bryman, 2015), this study seeks to preserve the qualitative nature of the data through the identification of themes relating to the development of the KAEC brand. This method is referred to as ‘qualitative content analysis’ and “systematically describes the meaning of quantitative data” while reducing the data to a manageable size at the same time (Schreier, 2014:170). By focusing on meanings that directly relate to the issue under study, qualitative content analysis provides insights on the use of public print media in relation to the concept of place branding. The data used was initially set to be collected using ‘Factiva’, a Dow Jones business information and research tool available online that collects data from newspapers in both English and Arabic. Unfortunately, the database search function started from 2008 and would miss the initial launch of the project by three years. To focus on the Saudi public and to limit multiple versions of the same press releases and article from affecting the data set, the study only looked at the main English newspaper, the Arab News, that is distributed in Saudi Arabia and closely mirrors the Arabic daily newspapers in the market. The analysis was further structured based on concept-driven meanings as opposed to a data-driven method (Schreier, 2014). This was done because the research focuses on type of message being communicated and by who and not the details of what is being conveyed. The next section details a description of the main key milestones of the project in local newspapers then goes on to provide an analyse of the key themes during the different periods of the project under study.

The data collected shows that the initial launch and mention of the KAEC project was through the Saudi Arabian General Investment Authority (SAGIA) under the umbrella-term ‘economic cities’ as Saudi Arabia initially announced the development of six special economic zones in 2005. This was later scaled down to four cities spearheaded by KAEC as it was deemed that the projects would compete with each other for investment. The launch of the EEC initial public stock offering (IPO) on July 22, 2006, saw the increase in the use of the independent name King Abdullah Economic City or KAEC in local newspapers as the private development partner EEC took over the management of the project. Mention in the media continued to rise as the initial phases of infrastructure development were completed and actual physical form took shape. The public media data

collection reported 414 original articles citing KAEC in various contexts from 21/12/2005 to 31/12/2015 (Appendix 2).

During the initial launch period, the government, represented by SAGIA, put out press releases regarding the new city initiative that reflected both nation and city core values including vision, urban development, economic and social progress, quality of life, exclusivity/luxury, and national pride. This was well received by the public as key government actors commented on the project in the media. In 2006 the government continued to spearhead the project's media presence with a focus on core values. Articles during this period also reported on the EEC IPO and included opinion pieces and editorials that supported the project and increased mention of the project in general. The next year saw the first shift from government control to EEC with a slight increase of focus on economic goals while maintaining the city core values and strong mention in other articles. 2008 saw a continuation of these trends with more increased focus on economic goals.

The period from 2006 to 2008 showed a consistent and strong presence in the Arab News newspaper and was strengthened further by sales advertising campaigns both in the media and through other channels. 2009 saw the first major shift in media exposure as the global economic crisis had begun and the project had slowly lost momentum and public interest as it was mainly focused on infrastructure development and had little completed urban form. The period reported more focus on international investment interest, taking advantage of Saudi Arabia's market stability during the crisis. Opinion pieces and editorials in the newspaper also started questioning the management and spending of the project during this period. By 2010 EEC's contributions to the media were very limited and focused on international investment interest as poor management led to financial deficits in the project which almost led to a shutdown of the project. Negative opinion pieces increased and editorials were contrasted with government press releases supporting the project and the country's investment potential.

Interest in the project increased again in 2011 as the EEC announced a \$1.3 billion government bailout to keep the project afloat. Opinion pieces and editorials in the newspaper either supported the project or cautiously asked questions. Of note during this period is EEC's lack of a clear explanation, accountability, or transparency for a public

company as they continued to issue press releases that reflected economic goals and urban development without directly responding to questions regarding the bailout or management of the project. 2012 and 2013 saw a shift in management and renewed focus on reaching economic and urban development goals. It also saw the beginning of the city's re-branding process and a drive to focus on completing public projects in the city. In 2014 the project stabilized and focused again on achieving economic and urban development goals. This trend continued in 2015 as the city started to focus on the social aspects of the city. The last two years of the study showed extensive media coverage and mention in various platforms and industries as well as renewed international focus and investment as the world financial crisis has stabilized. The following table summarises the main results, associated milestones, and themes of each period:

Period	Number of articles	KAEC milestones	Themes
2005 (21-31Dec)	7	Launch of project	City core values, opinion/editorials
2006	47	Initial development period	City core values, opinion/editorial, association with other projects and industries.
2007	44	Initial development period	Economic and development goals, city core values, opinion/editorials, association with other projects and industries.
2008	43	Initial development period	Economic and development goals, city core values, association with other projects and industries.
2009	26	Financial Crisis, weak performance	Loss of momentum and public interest, international investment, negative opinion pieces and editorials
2010	18	Financial Crisis, weak performance	International investment, opinion and editorials, government press releases
2011	38	Bailout	Bailout, economic and development goals, conflicting opinion pieces and editorials/government press releases, association with other projects and industries.
2012	27	Redevelopment period	Limited economic and development goals,
2013	47	Rebranding	Economic and development goals, new start, opinion/editorials, association with other projects and industries. government press releases
2014	65	Growth period	Economic and development goals, opinion/editorials, association with other projects and industries.
2015	52	Growth period	Economic and development goals, social progress, international interest, opinion/editorials, association with other projects and industries.

Table 7-13 Article distribution by year, KAEC milestones, and themes

The analysis of public print media first and foremost shows the country's strong, albeit uneven, support for the project, both financially and through media channels. It also highlights the shift in control from government to the private development partner EEC. Clearly mistakes were made in maintaining transparency and accountability for the project during the weak performance period from 2009-2011, leading to the government bailout in 2011. While government support stabilized the project, there has been no visible shift in policy when it comes to transparency and accountability, a core factor in developing new cities around the world as mentioned in chapter 2. Though EEC has shown effort in focusing on social development in the city, it was done late in the development process and was very limited in scope. The majority of effort was still placed on attracting international investment and selling public city products such as residential and industrial units and plots of land. From a public perspective, there was much interest in the city but dialog in the media was subdued, reflecting a respectful stance as the city was strongly supported by and holds the name of the former King of the country who died in the beginning of 2015. These cultural nuisances shape people openness for public dialog, which has been shown to be more open in electronic and social media, something that will be further studied in the next section.

7.4 Social Media Analysis

Social networking sites and specifically microblogging applications have given public stakeholders the power to participate in the creation and communication of information and can provide useful insights on the awareness and infiltration of specific ideas or products (Weller et al., 2013; Ellison, 2007). This is especially relevant in non-democratic countries as it provides users with the freedom to express and share their thoughts with less government scrutiny (Mourtada and Salem, 2014; Hermida et al., 2014). Boyd and Ellison (2010:220) go on to describe how data from social networking sites can be “gathered either through the use of automated collection techniques or through datasets” and analysed to provide insights. Ultimately, Place brands are a “virtual phenomenon” and that “the Internet has revolutionised this domain and will increasingly dominate place branding as it allows many new ways in which to virtually enhance both the reality and representation of place” (Govers in Kavaratzis et al., 2015:74).

For the specific case of KAEC, understanding how the city’s brand was discussed in public forums on the internet provides data that can be used to support both the representation analysis and print media study conducted earlier in this chapter. There is a consensus in the literature that Twitter is presently the most popular microblogging application on social media (Weller et al., 2013). Launched in 2006, Twitter allows users to post, share, and discuss any topic without any restrictions (twitter.com). Information is indexed using the concept of ‘hashtag’ that classifies topics so they may be accessible to the general public (ibid). ‘Topic Detection and Tracking’ (TDT) tools for the platform have become useful in information creation and identification of trends (Paltoglou, 2015; Benhardus and Kalita, 2013). From a Middle Eastern perspective, the Dubai School of Government’s ‘Arab Social Media Report’ has periodically compiled information on different social media platforms in the Middle East. The report highlights Saudi Arabia’s position in the region as the country with the highest number of active Twitter users, reaching more than 33% of the country’s online population (Mourtada and Salem, 2014). While social networks such as twitter took time to become popular in Saudi Arabia due to religious resistance, proliferation drastically increased by 2011 making the platform essential for daily social communication, political discussions, and marketing (Howard and Hussain, 2013).

For the purpose of this study, a variety of TDT tools were reviewed and their relevance to the study was determined. Initially the social media analytics tool ‘Topsy’ was selected to identify trends in the development of the KAEC brand on the Twitter platform. What made Topsy relevant was the precedent in its use in research (Dyar et al., 2014; Mishori et al., 2014; Bredl, 2012) and its ability to work in both English and Arabic, a factor that was imperative as users in Saudi Arabia predominantly speak and tweet in Arabic. Unfortunately, the platform was purchased by Apple in late 2013 and has been taken offline at the end of 2015 (Moon, 2015). As no other easily accessible platform provides exactly the same level analytical data, the study used a combination of three tools to gauge how and to what extent has twitter been used to support the creation of the KAEC brand. These tools are Twitter’s advance search function (Twitter, 2016), twitonomy which provides detailed analytics on users and hashtags (twitonomy, 2015), and finally tweetreach, which measures the reach of Twitter brands and hashtags (tweetreach, 2015). The following section will outline the EEC’s efforts in utilizing twitter to develop the KAEC brand and provide an analysis of the main hashtags that relate to KAEC.

Managed by EEC, KAEC joined twitter under the user (@kaec_saudi) on 13/5/2013, recording 9,245 tweets, 238,000 followers, and 794 photos as of 15/1/2016 (twitter.com/kaec_saudi). Their first Tweet was on 23/5/2013 and describes the first private school in the city. Prior to this period, employees of the city tweeted under a hashtag that consisted of the full name of the city in both English and Arabic. The #KAEC hashtag is mainly used by the official twitter account of the city and has shown a total of 17,800 tweets since it was adopted on 12/12/2012, approximately six months before the city opened their twitter account. As the platform took time to attract users, exploring twitter activities during the first two periods under study, the launch and the initial development of the city, was not possible. That said, the present widespread use of the platform makes a review of the prevalent themes on the platform worthwhile in gauging how EEC has used social media to build the KAEC brand and how the public has responded. The main themes identified through a sampling of the 150 most recent tweets are sales, event information, press releases, photos of the city, general social posts, job opportunities, the Cityquest forum, and retweets about the city from other sources (Appendix 2). During the same period, replies on EEC’s posts focused on requesting information on sales and the public frustration that finished elements of the city or events being held there cannot be visited without an invitation. Keyword searches highlighted

the public's use of the two original hashtags used to tweet about the city, namely #king_abdullah_economic_city and its Arabic equivalent, both of which started to be used in 2012. The main themes associated with these hashtags are photos of the city from visitors, development progress, accessibility to the city, events, projects in the city, and retweets about press releases. The following table developed for the research summarises the main activities and elements of KAEC's twitter awareness:

Activity/Element	#مدينة الملك عبد الله الاقتصادية (Arabic Hashtag)	#king_abdullah_economic_city	#KAEC
Date of First Tweet	25 May 2012	7 Sep 2012	12 Dec 2012
Total Tweets (up to 15/1/2016)	704	8,660	17,800
First User	Visitor - Female	Employee - Female	investment consultant - Male
Subject of Tweet	Describing a visit to the city	Personal tweet about starting work in the city	Personal tweet on the progress of the city
Main Themes	photos of the city from visitors, development progress, accessibility to the city, events, investor projects in the city, and retweets about press releases	photos of the city from visitors, investor projects in the city, Cityquest forum, retweets about the city from #kaec.	sales, event information, press releases, photos of the city, general social posts, job opportunities, the Cityquest forum, and retweets about the city from other sources.
Estimated Reach of each Tweet	626,089 accounts	536,887 accounts	563,953 accounts
Main contributors	Online news site (@masdar_saudi), Online News site (@elakhbar_saudi), public figure, development (@abdaullah1991), public figure, development (@fahoodi2222), public figure (@AzizAlgasim), public figure (@Rebaq2)	Public figure (@Sameera_CSI), KAEC (@kaec_saudi), KAEC (@KAEC365), Academic (@SarahKMoser)	KAEC (@kaec_saudi), a digital media specialist (@ibhm), and an online news site (@me_jeddah)

Table 7-14 Main Twitter hashtag data and themes

This review shows that there is very little public dialog when it comes to KAEC that is not controlled by EEC itself. New content in the form of original tweets from other sources focus on visitor impressions of the city, photos, or direct questions on sales,

events, or access to the city. While any questions on sales or organized investor visits are promptly answered by ECC employees, questions regarding the limited access to the public are addressed by a standardized message that states that the city is only accessible to the public during events. Any additional comments or requests for explanation are ignored. Another interesting result of the analysis is the importance of key public figures on the platform and their reach and ability to drive public sentiment regarding the KAEC brand. That said, the limited number of tweets on the Arabic hashtag in the four years since its use began show the weak interest people have on the issue. Finally, it is interesting to note that while the majority of key contributors to the KAEC topic on social media have been men, women have also been very active on Twitter since its rise to popularity and shows a cultural shift as more women enter the workforce and show a stronger interest in being involved in what goes on in the country.

The analysis of both print and social media have highlighted the following findings:

1. There exists a clear relationship between transparency and accountability in communicating the branding message.
2. The use of word-of mouth and social media affects city brand awareness.
3. Weak performance in utilizing visual, print, and social media in communicating information about KAEC and building a strong public image of the project.

7.5 Conclusion

The three analysis methods detailed above have shown government and EEC efforts to build public awareness of KAEC. The first two methods highlight the main development periods of the project, launch, initial development period, and redevelopment period. They also both show the shift that has occurred from elements that represent core values of the city such as economic and social progress, and national pride to investment and city products, with a focus on luxury, affluence, and exclusivity instead of affordability and inclusion. As mentioned in the literature, all segments of society are stakeholders in the creation of a new city and need to be included in the process, something that EEC has not taken into account. Another key factor that has been highlighted in both the print and social media analysis is the lack of transparency and accountability in the city's performance from 2008-2011, a factor that was found to be crucial to the success of the

project. Finally, the analysis has shown the reach of social media in building city brand awareness in Saudi Arabia. Unfortunately, the city has shown weak performance in utilizing visual, print, and social media in communicating information about KAEC, building a strong public image of the project, or encouraging dialog. While this chapter has explored what the government and EEC have done to build public awareness for KAEC, the next chapter will try to answer why this public image has been inconsistent by studying the stakeholders involved in the process.

Chapter 8 Qualitative Data Collection and Analysis

8.1 Introduction

As a place brand is the direct result of conscious agency in the development of place identity, key actors become important to the process in the beginning phases of a city's development. As the city starts to take physical shape, the focus shifts to encompass a larger and more diverse group of actors and becomes driven by more than just agency. As KAEC was in the initial stages of development, the entities that control the development process are also responsible for building brand identity (Ren and Berg, 2014). To understand the complex nature of the development and branding of new cities it is crucial to recognise the different relationships that exist between material objects and semiotic concepts that create the city entity. As mentioned in the conceptual framework developed for this study in chapter 4, the theoretical lens of actor-network theory (ANT) was used to trace the transient enactment of the KAEC place brand as urban form develops in the project. Therefore, the analysis first focused on the power relations between different human and non-human actors. It then went on to explore their actions through a Post-ANT concept of enactment. Essentially moving from the 'who' and the 'what' to the 'why' and 'how'. The goal was to trace how actors assert their influence and control on the development of the place brand. Using actor-network theory as a lens to study the development of place branding helped the study explore all possible major actors, sometimes with differing and contradictory interests, in the process and giving them equal value in the analysis.

As outlined in chapter 5, the two main groups that were of relevance to the study were identified as the entities involved in the public-private partnership and end-user stakeholders. Nine (9) participants from the first group were requested to discuss how the city's brand identity was developed and who were the different actors involved in this process. The second group of thirty-one (31) interviews included local and international professionals, investors, and academics. They were asked to discuss their views on how they perceive KAECs development and brand identity. They also identify the mediums and representations they used to build these opinions. The data collected and analysed from these two groups was used to shed light on the development and branding process

at KAEC. It then went on to decipher the reasons behind these actions and identify alternative possibilities that may yield more representative outcomes. These different perspectives and their analysis will be discussed in detail in the following two sections.

8.2 Key Actors and messages involved in the development of the KAEC Brand

The first section in this analysis highlights the complexities within the process by identifying the key actors involved in creating two distinctive identities for KAEC; an investment brand and a local holistic brand. Essentially the city was developed based on an investment model with the government providing options on the land, support, and business incentives while EEC covered the cost of the project through sales. Therefore, branding efforts focused on the two end-user groups targeted by the project; investors and local residents. The use of ANT in tracing both brands was published in 2015 in the *Journal of Place Management and Development* (Shoaib and Keivani, 2015) and is outlined in the following sections.

8.2.1 Developing an Investment Place Brand

The first step in understanding the branding process at KAEC began with the initial stages of planning the city. Saudi Arabia's leadership approved the development of six new economic cities to diversify the country's economy. The KAEC brand took form through official press releases and news reports that quoted the then King of Saudi Arabia, the Emir of Dubai, and government officials. The focus was on visionary statements that denote accreditation as well as economic and social progress. An example is the Emir of Dubai calling KAEC during the launch event "another jewel in the crown for Saudi Arabia" (KAEC, 2014). Themes used focused on the prestige, prosperity, and reputation of the country with a strong economic focus, which was expected to eventually serve the nation's people but with little mention of how this will be done. This vision was supported by key people in the Saudi government and built a sense of excitement about the project and the future of the country. Furthermore, the inclusion of the Emir of Dubai in the launch of the city was intentional as Saudi citizens and international investors were familiar with the rise of Dubai as a modern global city and a regional economic hub, which by association gave credibility to the KAEC project. Interviewees, when asked about their initial impressions of the city, were mostly positive about the project.

Examples included statements such as “Saudi is finally investing in the future of its people” (Appendix 3, Interviewee ID35), and “the city will be built as it holds the King’s name and his support” (Appendix 3, Interviewee ID23). The branding of KAEC was summed up by Saad Dosari, an influential Saudi writer, who was quoted in the local press as stating “The release of these plans back in 2005, with the breath-taking computer-generated footage of the future city was exciting, to say the least. It was a long-awaited step on the path to diversifying the country’s income, of rebranding it as the new destination for foreign investments in the region” (Dosari, 2015). Though interviews with professionals and academics cast doubts on implementation, trust in top leadership was the cornerstone of the initial KAEC brand and still positively affects the project after ten years despite the weak performance of the city.

From an ANT perspective, when the Saudi Arabian government became the main actor in this network, they appointed SAGIA and EEC to spearhead the development. Furthermore, the government connected with media to communicate their message about the city and showed strong government support for the project to the general public. Additionally, they linked to special interest groups and individuals who would directly benefit from the project as a part of the local political process. Overall, the leadership created a network of actors who converged to enact their version of reality. SAGIA and EEC promoted the concept of the city using economic policy, representations, and foreign relationships, essentially the first attempt to develop a place brand for the city and make the network more durable. Government leadership went on to connect the different actors and mobilize them to address the goal of making the city successful. The ultimate goal was to ensure all actors had the same goals or were in a state of ‘convergence’ while shifting and re-aligning their roles through the ANT process of translation. This unity of purpose is only threatened when power is contested by more than one actor, compromising the stability of the network, something that was not the case in the early stages of KAEC’s development.

After the vision of the project was in place, responsibility was delegated to SAGIA, making the organization the main actor in the network. This shift in power did not affect the stability of the network as convergence was maintained. However, as the project progressed, poor implementation, lack of transparency and regulation, as well as the onset of the 2008 global financial crisis almost led to the failure of goals set by government.

Interviews with government and city officials highlighted the problems associated with the ‘big promise’ of an operational city in so little time. As one international investor stated, “in the early stages of the city’s development process, the regulations kept changing, promises made about acquiring labour were not fulfilled, utilities were not in place to support us”(Appendix 3, Interviewee ID10), all of which resulted in a limited amount of initial investment in the city. These factors, coupled with the global financial crisis and lack of transparency almost bankrupted the project, requiring a large government bailout and restructuring to keep the project afloat. Due to SAGIA’s national investment commitments, the government felt that a specialized entity should be created to independently focus on the development of new cities. They created the Economic Cities Authority (ECA) to replace SAGIA, and transferred control of the city to the private developer EEC. As the message projected did not change and managerial issues were addressed, the project slowly attracted both local and international investment.

While Saudi Arabia’s international image includes both positive and negative aspects, depending on audience and their vested interest in the country (Foley, 2010), the launch of the economic cities initiative was near enough to the worldwide financial crash to attract investors looking to expand into stable and growing markets in the GCC. Moreover, interviews with international investors showed that the existing cultural and religious aspects of the country or even local perceptions of KAEC itself had little to do with their decision to invest. As one international investor stated when reflecting on his first visit to the project and being shown the master plan and model, “Oh my God this will be amazing if it is built”, and then went on to say, “the reason we bought land, quite simply, come down to money. We paid a fraction of what we would have paid in Jeddah for fully serviced land. From a commercial consumer perspective, not a residential one, it’s a no brainer; it’s a great deal” (Appendix 3, Interviewee ID11) the interviewee went on to say “I don’t see the growth in the other city sectors there yet”, casting doubt on the development of a complete new city. However, many companies that are based in the less conservative UAE perceived Saudi Arabia as an investment opportunity and were not interested in being a part of the existing population or community, simplifying the branding of the city into a straight forward business opportunity. This perception built a new reality, one that focused on investment instead of advancing the merits of a fully operational city, a perception that was encouraged and enacted by SAGIA and EEC to promote the city. This shift in branding policy focused on what investors said they really

wanted instead of the initial holistic brand created by EEC. This led the project to gain momentum in industrial sales and improve its business image. The main actors in the investment place brand as seen through the ANT lens and how power shifted between them can be seen in the following figure:

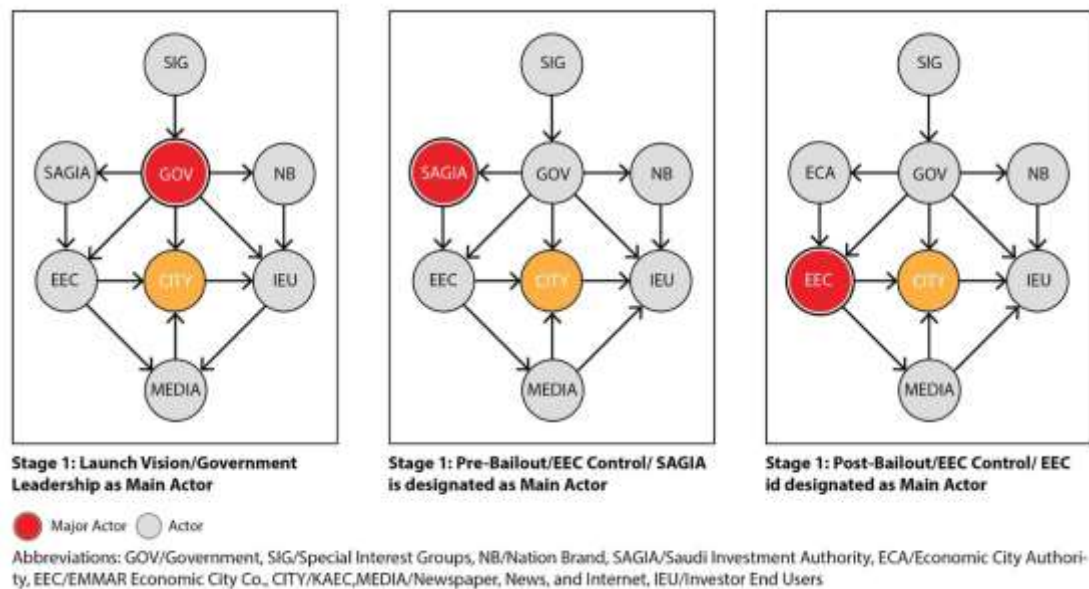


Figure 8-1 Tracing major actors in the development of an ‘Investment’ brand

8.2.2 Developing a Holistic Place Brand

The second segment targeting local end-users also started with government leadership defining the main actors and their roles and relationships. While power was initially delegated to SAGIA whose focus was on the city’s foreign and domestic investment message, EEC, the private development partner was given the responsibility for the development of the non-investment portions of the KAEC project, including the city’s infrastructure, built environment, and branding. From a third perspective, local media started to highlight both press releases from SAGIA and EEC as well as negative reports on progress and corruption that led to the bailout. EEC’s initial strategy was to push the concept of change and development on a massive scale, promising a working city, new jobs, and homes in a very short time, a goal that was not achievable or realistic but reflected the country’s push towards quick results with little strategy for implementation in place. By the fifth year of development, tangible results still could not be seen. This led to the loss of public trust that the city could function and perform as communicated

in the original vision. As one local visitor to the city stated, “when you drive into the city, all you see is empty land. Even when you reach the office and apartment area you really doubt that this will be a real functioning city anytime soon” (Appendix 3, Interviewee ID27). Essentially, poor implementation and a fragmented message from three conflicting actors, all attempting to enact three different realities, weakened the local brand.

After the bailout stabilized the development of the city, the shift in actors again realigned. The new public entity ECA, was only involved in the project from an investment perspective. EEC remained in full control of the project but focused on selling city products instead of branding KAEC. An EEC employee stated that the marketing strategy of the city had “shifted from one big promise to smaller, more attainable goals” in the form of sales targets and developing relationships with stakeholders that could act as advocates for the city. From a different perspective, the media’s negative coverage of the bailout, limited local stakeholder participation, and few results on the ground shifted power from EEC and ECA to local end-users who built their own impressions of the project and communicated this message to their existing social networks that in turn influenced interest and investment in the city. Interviews with key local residents emphasised the importance of word-of-mouth in building different impressions of the city with little awareness of EEC’s efforts except as a medium to sell property. One local resident said, “I don’t understand why anyone would buy or move there” (Appendix 3, Interviewee ID24) whilst another said, “at this point most of what I know or believe about the city comes from the opinions of people close to me” (Appendix 3, Interviewee ID17).

Finally, as there was no main actor driving the city’s brand message, the combination of limited built environment and community, the various versions of reality put forth by different actors developed a new identity of the project, one that was fragmented and conflicting. During the interviews, local participants repeatedly referred to the city by name as a separate entity and had little conception of the different actors involved. But what city were they referring to? As of 2014, KAEC was less than 15% completed with less than 2,500 residents (KAEC, 2014). This brings to mind theories of ‘Ontological Design’ where concepts people create can influence behaviour (Willis, 2006). The analysis of stakeholder opinions has shown that the initial branding of KAEC has influenced people into believing in its existence. Furthermore, it has shaped their decisions on investing in a non-existent place with little signs of success with the

exception of its industrial elements. (UN, 2014). Cities not only hold an essential economic role but also act as agents for social, cultural, environmental, and political change. They also shape the way the world functions and interacts (Berg and Björner, 2014). The resulting re-aligned network of human and non-human actors and the associated shifts in power are as follows:

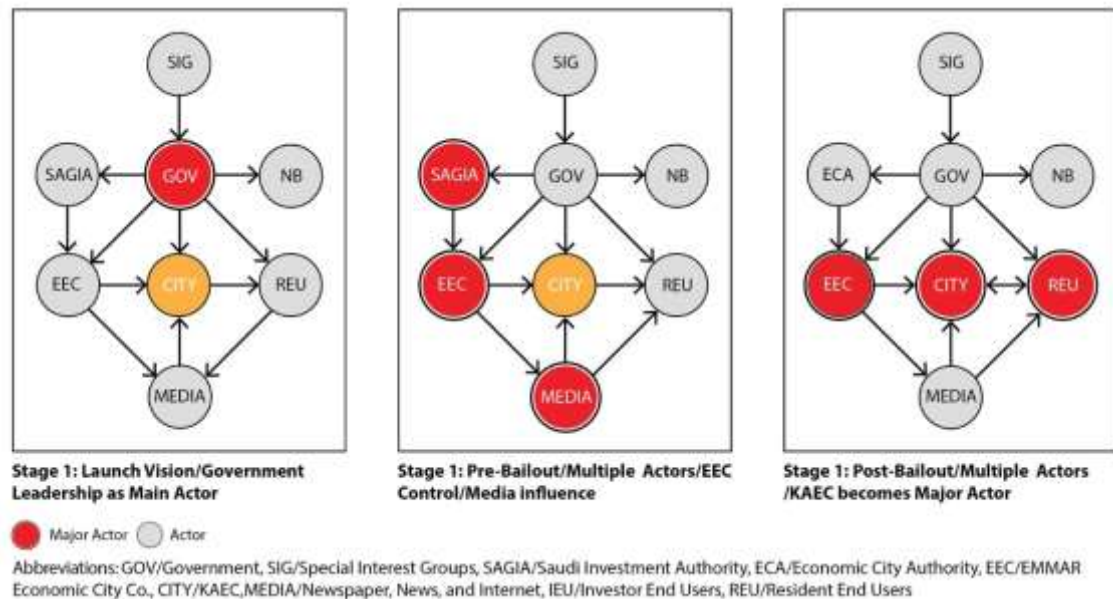


Figure 8-2 Tracing major actors in the development of a ‘holistic’ brand

What the ANT analysis above has highlighted is that successful branding is actor driven through a unified message and centralised control. It has further shown that when no main actor driving the brand exists or when multiple actors are in conflict, the resulting message is fragmented and weak. This has been quite clear in the KAEC project as there was a clear distinction between the development of an investment brand and a holistic city brand for the city through the main actors involved in the process with differing results. The analysis also highlighted how shifts in power over time can greatly influence how a place brand is enacted and is perceived.

The use of ANT has demonstrated that as projected realities conflict and struggle for dominance, beliefs change. Therefore, the question that should be explored in a new city context is what is perceived as the physical embodiment of the city? As little urban fabric exists, can they be referring to the KAEC ‘brand’ identity that was created to represent the city? Can this ‘brand’ then surpass conscious agency and influence the enactment of

other versions of reality? In the case of KAEC, and possibly other new cities in early stages of development, the concept of place brand can have a strong influence on perception in absence of physical form, becoming in some cases more important than the city it represents, embodying it in some cases with the power to enact change. The following in-depth analysis of the semi-structured interviews will attempt to answer some of these questions.

8.3 Enacting the KAEC Brand

The previous section highlighted the clear distinction between the development of an investment brand and a holistic city brand for KAEC through the main actors involved in the process and how these messages have evolved over the study period of the project. While the resulting analysis links the context of the branding process to individual actors and messages, ANT primarily provides insights on the interplay between actors and power (Van der Duim, 2007). To properly understand the process further, it is imperative to look deeper at the actions taken by key actors identified in this study and how these actions have affected the development of people's beliefs that is ultimately translated into brand identity. As mentioned in the methodology chapter of the study, thematic analysis was used to explore the data collected by the semi-structured interviews. The data was first coded through the software program 'Dedoose' and linked to specific themes that relate to the data-set under review. The focus was to identify themes on both semantic and latent levels to bridge the gap between direct statement and underlying meanings. The focus of this section is to present the analysis of these semi-structured interviews in relation to the conceptual framework developed for this study as well as the initial results from the other research methods outlined in this and the previous chapter. This starts with an overview of participant descriptors, the process of coding and finally identifying the resulting themes and insights.

8.3.1 Overview of Participants

This stage of the research focused on thirty-one semi-structured interviews used to gauge public awareness of the KAEC project from the perspective of development, communicated message, and place experience and what were the main factors that helped build this impression. The participants included males (23, 74.2%) and females (8,

25.8%), Saudi Arabians (25, 80.6%) and Non-Saudi Arabians (6, 19.4%) from a wide range of backgrounds. While a full list of participant descriptors can be found in Appendix 4, the following table summarises their main details:

Category	# of Participants	% of total Participants
Professionals	21	67.7
Academics	6	19.4
Government (Non-project)	2	6.5
Community figures	2	6.5

Figure 8-3 End-user Participant Main Details

Background of professionals included business, real estate, contracting, design, HR, and marketing. Of this number 17 (54.8) had visited the KAEC project prior to the interview as opposed to 14 (45.2) that had not.

As the interview process commenced, it became clear that participants fell into two main categories; individuals that had a strong interest in the project for personal, professional, or financial reasons, or individuals that had little or no interest in the development of city as it didn't directly affect their lives. Surprisingly this classification was not based on profession or background but on need. This distribution will be further discussed in the following sections.

8.3.2 Coding of Excerpts and the Development of Themes

The coding tree developed for the analysis of the semi-structured interviews was based on the three distinct stages of the process outlined in the conceptual framework. They are KAECs physical development, the communicated message developed by EEC, and the resulting place experience. The two later stages represent the city's brand identity. The initial codes were identified from the literature review and conceptual framework chapters. Additional codes were also incorporated from the analysis results in chapter 7 or identified or consolidated during the coding process of the interviews to reflect themes that emerged from the data. All of which were later grouped into a more defined set of themes and sub-themes. For example, codes such as physical components, infrastructure,

technology, and modernization were identified in chapter 2 and 4 as main elements in the development process and were designated as ‘Urban Development’ which was later grouped with Economic and Social Development under the top-tier theme of ‘Development’. Another example is how codes such as word of mouth, newspapers, social media, and events identified in the interviews fell under the sub-theme of ‘Communication Type’ mentioned in chapter 3. This sub-theme was later grouped with ‘Communication Focus’, and ‘Authenticity’ under the top-tier theme of ‘Brand Identity’. A summary figure of all seven (7) themes, six (6) sub-themes, and forty (40) codes can be seen below.

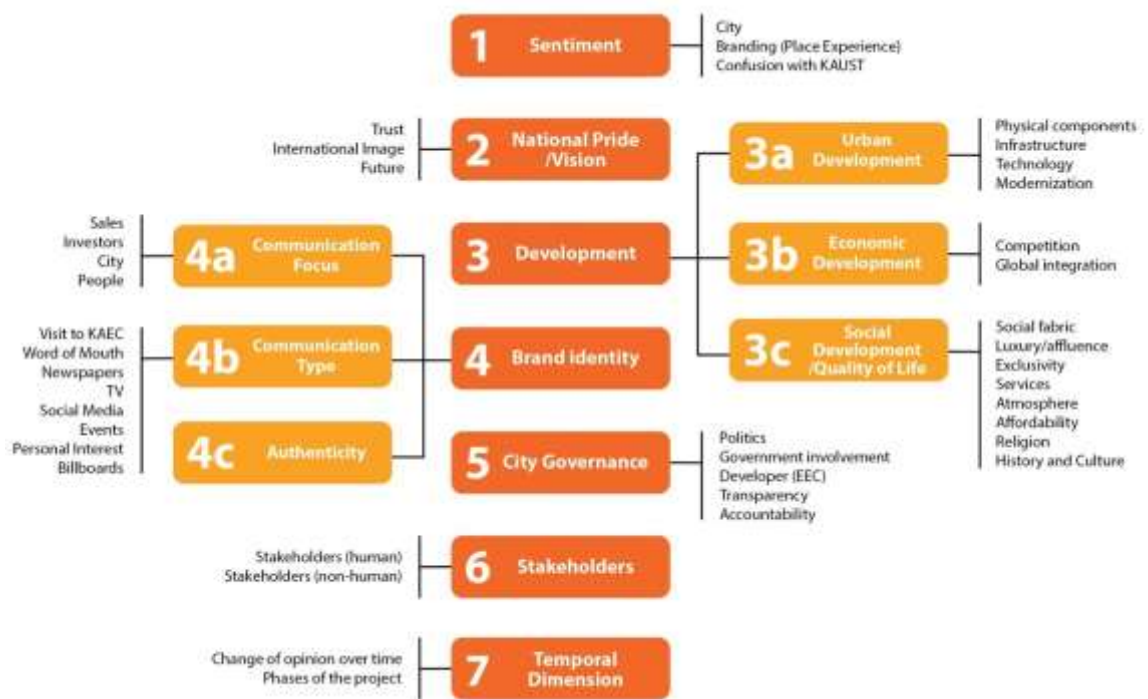


Figure 8-4 Code Tree with Main Themes

The next section will further breakdown these themes in relation to different stakeholders involved in the process and how each one is linked to the branding process of KAEC.

8.3.3 Semi-structured Interview Analysis

The in-depth analysis of interviews provides insights on the development and branding process of KAEC. It also provides a visual guide to interpreting the data and the correlation between themes, codes, and participant descriptors. Using quantitative

divisions of the data such as presence and co-occurrence can expose key patterns within the qualitative data as a function of its descriptive characteristics and higher meanings. Five main tables summarizing the relationships between descriptors and codes and between the codes themselves were used to build the first layer of analysis and were described in chapter 5. They are ‘Code Presence’, ‘Descriptors/Code Count’, ‘Code Application’ and ‘Code Co-Occurrence’. Additional data on ‘Code Weight Statistics’ was used to further expand the analysis of various themes to represent relative importance, quality, sentiment, and strength. All tables can be found in Appendix 4. The analysis started by categorising all themes, sub themes and codes based on their presence in the transcripts, then use these codes as a starting-point to build connections with other categories. Each theme was explored individually to highlight key insights. 1084 code occurrences were identified in the interview transcripts. All themes, sub-themes, and codes as well as their individual code counts can be seen in the following table:

Theme or Code	Count	Theme or Code	Count
Sentiment (Place Experience)		Stakeholders	14
Branding	47	Stakeholders (human)	5
City	105	Stakeholders (non-human)	
Confusion with KAUST	9	City Governance	12
National Pride/Vision	23	Government involvement	30
Trust	11	Developer (EEC)	19
Future	34	Politics	13
International Image	3	Accountability	8
Development	28	Transparency	6
Urban Development	50	Temporal Dimension (Project Phases)	30
Physical components of the city	29	Change of opinion over time	17
Infrastructure	14	Brand identity	8
Technology	2	Communication focus	34
Modernization	3	Investors	48
Social Development	63	City	12
Social fabric	12	Sales	61
Luxury/affluence	3	People	23
Exclusivity	17	Communication Type	17
Services	10	Billboards	17
Atmosphere	14	Events	14
Affordability	7	Newspapers	26
History and Culture	19	Personal Interest	20
Religion	10	Social Media	16
Economic Development	12	TV	9
Competition	5	Visit	20
Globalization	2	Word of Mouth	27
		Authenticity	46

(colour code: grey 0-9, yellow 10-29, orange 30-49, green <50)

Table 8-1 Theme and Code Presence

Based on this categorization, the following key themes, sub-themes and codes have been identified and will be the initial focus of the analysis:

Theme or Code	Count
Sentiment (Place Experience)	
Branding	47
City	105
National Pride/Vision	
Future	34
Development	
Urban Development	50
Social Development	63
City Governance	
Government involvement	30
Temporal Dimension (Project Phases)	30
City identity and Image	
Communication focus	34
Investors	48
Sales	61
Authenticity	46

(colour code: orange 30-49, green <50)

Table 8-2 Key Themes and Codes

The following sections analyse these connections by first looking at the main three codes that stood out in terms of importance; (1) sentiment, (2) social and urban development, and (3) sales communication focus, and then examining the existing or non-existing connections between them and other themes. The remaining codes and themes that scored average occurrences (in orange above) were then analysed and discussed in association with other similar themes or independently to highlight different results of the analysis. Excerpts from the interviews were used to support the different arguments, in the text body each quote is linked to its interview number, interviewee descriptor and finally the location of the text in the interview transcript by character position (see appendix 3).

8.3.3.1 Sentiment

During the interview process participants were asked to give their impressions of the KAEC project and its branding. As this is the main focus of the study, the ‘sentiment’ theme had the strongest presence in the data collected with almost every participant contributing either positive, neutral, or negative opinions on their awareness of the project, its development, and branding (see table 8.1 above). Furthermore, each code in this theme was accompanied with a rating to depict its relative importance and strength.

From this category, two broad codes; sentiment about the city and its branding were identified and analysed. Interviews initially started with participant perceptions of the city and focused on their inherent beliefs in the project and its physical development. It wasn't until later in the interviews that their opinions on branding were communicated. While each sentiment category provides insights that help us understand how people perceive the development of KAEC from the perspective of place experience, both are also directly connected to each other and to other themes. The main sentiment categories identified as key codes will be discussed in detail in the following sections:

a. City Sentiment

Out of a total of 1084 codes, 105 were directly associated with participant views of the KAEC project. These codes fell under two main levels, positive and negative with some neutral opinions reported. These opinions further reflect the mixed feelings identified in the actor and media sections of the analysis. Positive quotes included statements such as:

“I have complete trust in the King and the Saudi government that this project will succeed and benefit the country”

(Interview 39, Community figure, Character Position: 197-310)

“I do believe in the project and it must be supported to help the county develop. It is imperative for it to succeed because it holds the name of the King and is his legacy”

(Interview 23, Professional, Character Position: 1275-1448)

These two quotes represent many of the positive comments being made by Saudi nationals about the city. There are strong connotations of loyalty to the King and government and an underlying dream of a better future. These feelings are mirrored in the co-occurrence analysis where ‘City Sentiment’ is strongly related to ‘National Pride/Vision’ and to ‘Future’. What this means is that the ‘accreditation’ factor mentioned in chapter 3 (section 3.3.2) of the literature and identified as a key component of the conceptual framework developed in chapter 4, reflects how public opinion is shaped in Saudi Arabia and the importance of personal and social relationships in the process. This further influenced people’s impression of the physical components of the city and its

success in attracting investment, again elements that have shown strong correlation with city sentiment. Quotes included:

“That they are constantly putting out real estate products in phases gives a good indication of success, also press releases from major companies that announce opening factories in the city is also a strong factor and gives a strong indication of the support they are receiving from the government to get so many local companies to show interest”

(Interview 15, Professional, Character Position: 1188-1533)

“the impression I had was that this new massive development was alien to the area but with time it became the norm and something to inspire to. This cityscape of the future has become “the Dubai Style”, and stands for anything new and well done”

(Interview 15, Professional, Character Position: 2495-2879)

Finally, there is a strong social link in the positive comments, people in the country, especially the younger generations aspire for a less conservative country and see development as a means for change. The following quote clearly explains this sentiment:

“The perception I get from the development is that it will be more liberal and less conservative than other areas of the country. I feel that because the city will be modern and isn’t linked to existing cities, the social culture will be different and more open”

(Interview 15, Professional, Character Position: 4233-4494)

These and many other quotes were prevalent among participants that had not visited KAEC or those that had reported that they had little personal interest in the city. As these factors change, there is a shift in the narrative to a more nuanced sentiment that eventually becomes negative. This shift can clearly be seen in the following participant quotes that still feel positive about the project but separate the lack of proper implementation from the King and government’s vision of the project. Furthermore, some seem to believe in the project as a need as opposed to a government initiative. Quotes include:

“The city was first marketed through the government as the future of Saudi and I think the sentiment behind the project from top government and the king was really sincere”

(Interview 13, Academic, Character Position: 0-169)

“There is amazing potential there but it is unclear where it is going”

(Interview 11, Professional, Character Position: 2137-2321)

“I don’t have any problem that it will take a long time, if it eventually turns into a liveable modern city.... I and others need places like KAEC as the existing cities in Saudi can’t take more people”

(Interview 17, Professional, Character Position: 2896-3131)

Finally, the shift is made to negative sentiments that doubt the city itself on different levels. Here correlation shifts from national pride and vision to urban, economic and social development. In essence they are questioning the authenticity of the project as a city and the perceived focus on investment and sales as opposed to people. Authenticity is a major branding factor identified in the conceptual framework and is one of the cornerstones of the development of a positive place brand and image (see section 3.3.2 and 4.4). Quotes include:

“The development of new cities is a noble idea. But in the shadow of the political, economic and financial system that is prevalent in the country, there are serious doubts that they will be successful”

(Interview 13, Academic, Character Position: 1694-1891)

“I feel they have failed to reach their initial goals and have shifted to become a real estate sales oriented project. If they don’t start building the basic seeds of community, the project will never change or become a real city. People want something tangible. Something you can see and feel”

(Interview 40, Academic, Character Position: 3415-3710)

This shift from positive to negative sentiment can be summarised in the following figure:

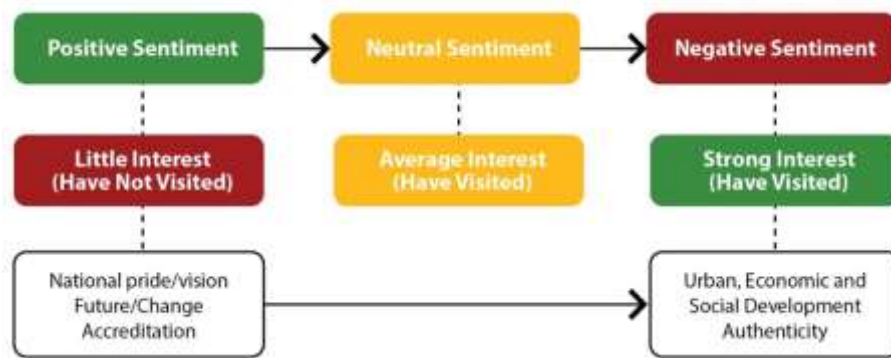


Figure 8-5 Shift in Sentiment

This lack of belief in the project goes further than just the physical and social development of the city. While Saudi Arabia allows social dialogue through its Islamic based system of governance, there are unwritten limits to criticizing higher levels of government. Saudi Arabia has recently been subjected to large financial losses due to the drop in oil prices and has undergone a change in leadership in 2015. The region is also rife with conflicts, some of which the country is directly involved in. While politics on a city development level are openly discussed in social circles and the media, the study has shown little clear mention of them in the interviews. Off the record many feel hesitant to invest or to trust long-term projects because of the uncertainties that face the country. One more forthright interviewee summed it up as follows:

“I think Saudi Arabia is very different than the rest of the GCC, its more controlled and conservative. And at the same time, you get bursts of political instability/rebellion every now and then, with the current situation in the country I don’t think that these sorts of projects will be sustainable in the long run”

(Interview 12, Academic, Character Position: 2896-3207)

But even with shifting perspectives on the KAEC project, general awareness and sentiment exists and is quite strong. Positive or negative sentiment have been shown to fully depend on other influencing factors and balance out to provide an almost neutral sentiment. As many of these influences factors are also key code in their own right, they examination in the following section will provide further insights on their important to the development and branding process of KAEC.

b. Brand Sentiment

Out of a total of 1084 codes, 47 were directly associated with participant perspectives on KAEC's branding practices making 'Brand Sentiment' the second strongest code based on frequency. The code designation can further be broken down into three sub-areas; general branding awareness, branding focus, and finally investment perspective. From the general perspective, the majority of participants felt that little real information was being communicated about the city. General quotes included:

“We know the name of the city and we know they are doing sales but there is little we actually know about the city itself”

(Interview 20, Professional, Character Position: 1561-1682)

“I hear about it through friends but they don't put out clear information about what they are doing, what is there and what they have accomplished”

(Interview 30, Professional, Character Position: 1157-1306)

“They are trying to do something different and unique but the image I got from them is very basic”

(Interview 19, Professional, Character Position: 235-330)

What these statements show is the level of confusion prevalent in the public which stems from the message being purposely communicated by the developer. Something that was quite clear in the analysis of end-users through ANT earlier in the chapter and through the shift in images used to promote the project in chapter 7. People recognize the project from the initial launch, but little has been done to reinforce this image in their minds. Though the financial need to focus on sales was made clear during interviews with direct stakeholders from EEC and the government entities involved in the project, it has ultimately hurt the reputation of the project. In a way, it strengthens many people's perception that they have not been able to develop a city and have reverted back to being a real estate developer who focuses on sales. This is further reinforced by a strong correlation between brand sentiment and city communication, sales, and lack of authenticity. As various participants have stated:

“People don’t have a realistic impression of the future of the project. The impression in the general public is that there are investment opportunities and sales but not the real value of the project”

(Interview 21, Professional, Character Position: 1903-2102)

“What they are showing (in terms of branding) is mainly to sell villas and apartments which makes them look like a developer looking for profits and not a city project”

(Interview 18, Professional, Character Position: 1373-1517)

“Their focus is on people that are related to investment and development; they need to take this further to reach every level of society. Something that is not just linked to sales and real estate but focuses on the future of this city”

(Interview 21, Professional, Character Position: 2340-2576)

However, this sales and investment focus hasn’t been totally rejected, all international and local investors interviewed felt that while they agree that little effort was given to brand the city, that didn’t affect them or the industrial opportunities existing in the city and those resulting from the operation of the Port. Again, something that was also clear from the previous ANT analysis and in statements from participants such as:

“From a marketing perspective I don’t think they did a good job promoting the city. But they did an excellent job making the case for a business opportunity”

(Interview 38, Professional, Character Position: 1410-1565)

“The selling point for the project isn’t the city or facilities, it’s the seaport, the railway, and the industrial valley, these are existing elements that can help my business, not the city or the brand”

(Interview 11, Professional, Character Position: 700-901)

While this focus would be acceptable if EEC and the Saudi Arabian government were developing an industrial area/estate, this is not the main goal of the city that promised jobs, homes, and a better quality of life for Saudi Arabia’s growing population. This

inconsistency of message mentioned in the literature and again in the ANT analysis causes a lack of authenticity that negatively affects the project. It is understandably difficult to promote something you are not doing. Communication must follow actual action. Here weak management and implementation comes into play and stems from the top-down decision-making process prevalent in the country that has spawned a lack of transparency and accountability, even for a publicly traded company such as EEC. Reports of the involvement of special interest parties, financial woes, and corruption mentioned in the media study reinforce the need for reform. The predominantly negative branding sentiment identified in the analysis (Appendix 4, Code Weight Statistics) will only improve if focus is realigned with the original message developed for the project.

c. Other Sentiment elements

An unexpected additional code was introduced under this theme and titled as ‘confusion with KAUST’. KAUST is the abbreviation for ‘King Abdullah University for Science and Technology’ mentioned in chapter 2. KAUST is a fully built and operating western-oriented graduate level university located between Jeddah and the KAEC project. The university caused much controversy on opening as it included a mixed international student and staff environment that was seen to go against the cultural and religious values of the conservative country. But as the project was financed and supported directly by the late King Abdullah, few negative views of the university were expressed. Its proximity to KAEC and its impressive campus has caused confusion between the two separate entities. As both the university and the city project are gated and cannot be accessed without an invitation, people are not provided with the information needed to distinguish between the two. As one participant mentioned:

“I initially thought that KAUST was a part of KAEC. I didn’t know that they were two separate projects, from what was originally announced at the launch of the city, they said that they will be providing all services and facilities to the city including education. I don’t see the reasoning for building a complete university outside the city where it could have been an anchor and driven growth”

(Interview 40, Academic, Character Position: 790-1185)

While this confusion could have a positive effect on KAEC's image due to the community already existing at KAUST, the controversial nature of the university's mixed environment could reflect negatively on the project. In any case, this is just another example of lack of clear communication on the side of EEC and the city project's authenticity.

8.3.3.2 Development

While the KAEC brand embodies the physical, economic, and social components of the city, it is the actual development that shapes this brand and how end-users relate to it. In the conceptual framework developed for this study in chapter 4, this has been referred to as the 'city development'. In essence it is the place that is being developed on different levels. Initially the study focused on the urban and economic aspects of development while only marginally looking at the social development of the city. However, as the research progressed through the coding process and the preliminary analysis of the data, it became apparent that social development was equally if not slightly more important than urban development in the context of new cities and their branding (Appendix 4, Code Presence chart). Additionally, the sentiment behind participant's views on social development and quality of life were predominantly negative showing a perception that the project has put little effort in developing a social fabric in the new city and was only focusing on sales, a sentiment that is mirrored by the main communication focus theme it is highly correlated with. This can clearly be seen in the excerpts such as:

“Their focus is on people that are related to investment and development; they need to take this further to reach every level of society. Something that is not just linked to sales and real estate but focuses on the future of this city”

(Interview 21, Professional, Character Position: 2340-2576)

“Publicly the impression is that the project has failed, it hasn't worked, it doesn't include the basics to sustain life. It didn't attract people”

(Interview 40, Academic, Character Position: 476-656)

“Everything linked to the social aspect of the city doesn't exist there yet. You go there now purely for business. There are no universities or hospitals, no unique

shopping or recreation, there isn't anything there. It will take a long time for that to change"

(Interview 15, Professional, Character Position: 3756-4017)

"These newly developed projects almost seem "Disney-fied" but have the same social issues that are becoming prevalent in Saudi society such as weak connections to neighbours and immediate local community"

(Interview 12, Academic, Character Position: 5185-5382)

Many associated these feeling with the communication focus on sales and investment instead of people and social development.

"Instead of being shown a project I was being asked to go buy a house or a piece of land in a location that is far way without any services or reason to do so"

(Interview 19, Professional, Character Position: 1851-2007)

"This is fine if it was only set to be an industrial zone and not a complete city, they just haven't really focused on the people and their needs to encourage them to move there. You need a reason to move there, at this point in time that doesn't exist. Would I move there with nothing there and very few people?"

(Interview 40, Academic, Character Position: 2748-3060)

"They should focus on educating people on what they are doing and linking that to society and life"

(Interview 22, Professional, Character Position: 521-619)

By not focusing on the people, the project has built a perception that it isn't developing a city but a typical real estate project or industrial area/estate. This was further reinforced by the project's focus on certain levels of society and the sense of exclusivity that was being projected and implemented by limiting access to the city. This exclusion was a key point that raised concerns with some participants that felt the city should be developed for everyone and that without this inclusion, the project will have little chance for success. The following excerpts highlight participant thought on the subject.

“The city doesn’t seem to be inclusive or open to the public, is even hard to visit without an invitation”

(Interview 11, Professional, Character Position: 1751-1855)

“Perhaps what KAEK did not do is plan for an all-inclusive vibrant society, if you look at the model it is all very high-end, so perhaps they didn’t plan to have a mix of everything instead of a generic master plan”

(Interview 10, Professional, Character Position: 8438-8654)

“The problem is that you will not have a successful city without including all the different groups represented in a functioning city, to target a certain level of society, to segregate migrant workers as the city has done isn’t the correct way to go about it. Identifying and including all the stakeholders involved is going to be important”

(Interview 12, Academic, Character Position: 1518-1859)

“Clear segregation of social classes, areas for the rich and for the factory workers”

(Interview 36, Professional, Character Position: 1506-1589)

This disregard for social focus in the development process was also perceived as a push to shift from traditional cultural and religious values towards a lifestyle that is more international as opposed to Arab, Middle Eastern, or Islamic. While there is no evidence that EEC or the government were promoting such a shift in culture or a preference for a less conservative population, some participants believed that the lack of focus on the social aspect of the city was purposeful as they have not been shown otherwise. While these perceptions were not prevalent in the interviews, they clearly were a consideration to various groups in the country that hold more conservative values. Quotes included:

“I feel that our culture and traditions have little impact on the development of the project. People in our culture want to be close to their families, want to be close to other people. If these cities don’t realize this, then how will they grow?”

(Interview 17, Professional, Character Position: 1437-1681)

“I do feel that the city might be promoting a more mixed environment that isn’t reflective of our cultural and religious values”

(Interview 39, Community figure, Character Position: 956-1083)

“The majority of the country is conservative in nature but that doesn’t mean that they don’t want to live in a modern city or society. The city could attract more interest by reflecting all levels and ideologies of the Saudi population not just the rich or the less conservative”

(Interview 39, Community figure, Character Position: 1203-1484)

“From a political perspective you are encouraging this generation to be cut off from their culture and identity and this reflects directly on their understanding or connection to local urban form as they have no remaining links or association to history, culture, and traditions”

(Interview 13, Academic, Character Position: 3285-3562)

These misconceptions seem to be based on the project’s sales and investment focus, their targeting of less conservative and affluent people in their marketing and events, and the developer’s link to Dubai and the less conservative environment there. What the excerpts also show is that social development was an important component of how people perceive the KAEC brand, strongly affected their overall impression of the project, and should be represented in the development and branding process of the city.

8.3.3.3 City Identity and Image

In its most simple form, the KAEC brand follows the three main stages described in the conceptual framework developed for this study in chapter 4. They are the planning and development of the physical entity of the city, the message being communicated by city governance, and finally the place experience the public comes away with that all create the place brand. While the previous key theme focused on the development of the project, this category merges both message and resulting perceptions into one theme referred to as ‘City Brand’ as they are strongly linked and few participants could distinguish between them. This theme was further broken down into three sub-themes; Communication focus, Communication Type, and Authenticity. All themes in this sub-category are directly

related to sentiment participants have built on the development and branding of the KAEC project which were outlined in section 8.3.2 of this chapter. While the two themes are strongly correlated, this section explores the ‘Communication Focus’ sub-theme in more depth as participants showed strong interest in the element. The theme was broken down into four codes; City, People, Investors, and Sales. Of the four only sales and investment stood out in the coding but with negative connotations. Furthermore, the majority of participants felt that the present focus of KAEC’s communication was strongly economic in nature, something that was not the case when the project started and was controlled directly by the government. The following excerpts show a strong awareness of this shift in focus:

“When the project first started I felt that the marketing was a lot stronger than what they are doing now, they used to focus on the city, its future and the vision of the project instead of just pure sales”

(Interview 26, Professional, Character Position: 1630-1835)

“The focus has shifted from developing the country and providing jobs to selling apartments, villas and land. And I understand this shift in focus. Our citizens trust real estate. And we really don’t have much else in Saudi”

(Interview 40, Academic, Character Position: 1743-1966)

“I think that most people are a bit confused what the project is as it started from government but then it started to feel like a private real estate project”

(Interview 28, Professional, Character Position: 1566-1723)

The city and people focus suddenly changed to investment and sales as EEC moved from the ‘big’ promise to ‘small’ promises and attainable goals mentioned in chapter 6. This shift was noticed by the Saudi public and was clearly reflected in the interviews conducted for this research. Examples include the following excerpts:

“What I have seen didn’t reflect the potential of the city and only focused on the sales aspect”

(Interview 19, Professional, Character Position: 1619-1713)

“I think there is too much focus on sales and too little on people and their needs. They need to do more to educate people on the benefits of the city instead of targeting only the few people that have the money to invest there”

(Interview 39, Community figure, Character Position: 1523-1749)

“The only advertising you see in the papers or in the streets is to sell apartments, houses and plots of land, and that isn’t promoting the city, it is selling products”

(Interview 36, Professional, Character Position: 2362-2530)

Undeniably private funded projects run on sales but this is a unique case of development. The KAEC project was launched as a partnership between public and private entities as is the trend in many major development projects around the world as discussed in chapter 2. But KAEC went from being completely controlled by a public entity, the Saudi Arabian government that focused on the city concept, people, and future, to a completely private entity, EEC, that was mainly focused on investment and sales. One of the main factors highlighted in the sentiment section 8.3.2.1 of this chapter was that people’s trust in the King and government provided accreditation to the project. But what people now see is a real estate developer pushing to sell products based on promises of a functioning city that has not materialized in the last ten years and little effort to make that happen. Unfortunately, this unbalanced sales focus has led to a loss of trust in EEC, which has reflected badly on city and brand sentiment with comments like the following

“What they are showing (in terms of advertising) is mainly to sell villas and apartments which makes them look like a developer looking for profits and not a city project”

(Interview 18, Professional, Character Position: 1373-1517)

“It was like a big real estate project where they are selling property”

(Interview 34, Academic, Character Position: 251-322)

“I did notice some sales advertisements for the city but these were not geared towards promoting the city so they were useless”

(Interview 19, Professional, Character Position: 1492-1618)

“I really feel the goal of KAEC is business and will remain business”

(Interview 15, Professional, Character Position: 4018-4086)

There is a clear consensus in the interviews that for KAEC to succeed, the project must re-evaluate its stance on both development and communication to reflect a more balanced authentic brand. This truthfulness, this realistic representation or authenticity was captured in the data and marked high in coding presence as can be seen from the following examples:

“When you talk to the people at the city they give you this story about how incredible this is, but under the surface it’s not”

(Interview 11, Professional, Character Position: 436-561)

“In regard to building a realistic impression of the city, I think EMAAR has built an impression based on their short-term goals, and this, as I mentioned earlier is opposed to building a realistic impression of the city as a whole”

(Interview 23, Professional, Character Position: 2264-2497)

“The city was promoting a very strong exclusive western outlook. It gives the impression that we are not in Saudi and this might not be the general impression you want to give to the general public that is Saudi, like there is something wrong with how regular people in the country act or live”

(Interview 36, Professional, Character Position: 2916-3213)

Ultimately people build impressions from different sources and mediums as was clear in the sub-theme ‘Communication Type’. But this impression is not a result of one element but a composite of senses, what you see, what you hear, and what you touch all come into play in building an impression about a place. In this study for example, visits and personal interest had almost the same amount of influence as newspapers and advertising. Word-of-mouth specifically ranked as the highest type of communication that influences public opinion on the branding of KAEC. This mirrors the social nature of Saudi Arabia mentioned in the literature and is an important aspect of society in the region. Unfortunately, this has not been identified or taken into account in the branding of the city. On another front, people that have visited the KAEC project had a more favourable

impression of the city than people that have not. However instead of providing ease of access to the city, visitors can only enter by invitation or for special events. Understanding a target market and adapting strategy to them is the basis of any business and is even more important in a project that is still in its infancy and where brand belief is not wholly reliant on actual physical form and a vibrant community, especially in the case where very little of both elements exist.

8.3.3.4 Secondary Themes and Codes

After examining the three key themes that stood out in terms of importance to end-users, this section will analyse and discuss the remaining themes and codes that scored average occurrences in the data. These were national pride and vision, city governance, stakeholders, and the temporal dimension of place branding.

a. National Pride and Vision

As mentioned in section 8.3.2.1 on Sentiment, National Pride and Vision and specifically the code ‘Future’ are strongly linked to city sentiment. This desire for a better future for one’s family is deeply ingrained in Saudi Arabian society as family responsibility and ties are paramount to personal, Arab, and Islamic identity. This is especially evident in the more tribal areas of the country where heads of families and tribes have a unique position of power over individuals that is built on ingrained values of respect and loyalty from one side and an obligation for people’s wellbeing and protection from the other. This is further reflected in the feelings of loyalty and respect citizens exhibit towards the Saudi Arabian King and government. Statements that echo this sentiment were popular in the data with examples like:

“I do believe in the project and it must be supported to help the country develop. It is imperative for it to succeed because it holds the name of the King and is his legacy”

(Interview 23, Professional, Character Position: 1275-1448)

“I have complete trust in the King and the Saudi government that this project will succeed and benefit the country”

(Interview 39, Character Position: 197-310)

“I think the city started really strong in terms of initial identity but that wasn’t maintained and the message changed. Just knowing that the King was periodically visiting the city was a strong factor”

(Interview 15, Professional, Character Position: 5258-5460)

As mentioned in the aforementioned section, this link becomes akin to the concept of accreditation (3.3.2) as people trust the views of others as they respect them. This can also be strongly seen on a societal level as ‘word-of-mouth’ was found to be the top communication types that end-users take into account when building their impressions about a place brand. The correlation between nationality (Saudi Arabian vs international) and the effect of word-of-mouth clearly validates this point as it shows that this element weakly affects the opinions of foreign nationals who depend on business viability in their decision-making process over mass media, advertising, and social relationships and can be seen in the following excerpt from the Descriptors/Code Count Table (Appendix 4, Descriptors/Code Count Table):

	City	Communication Type	Billboards	Events	Newspapers	Personal Interest	Social Media	TV	Visit	Word of
Nationality: International	29	2	1	3	3	2	4	1	5	2
Nationality: Saudi	76	15	16	11	23	18	12	8	15	25

(colour code: grey 0-9, yellow 10-29, orange 30-49, green <50)

Table 8-3 Excerpt from of the Descriptors/Code Count Table

This validates the point made in the Sentiment analysis section 8.3.3.1 and highlights the strong value of social connections and word-of-mouth in the branding process of KAEC to Saudi Arabian end-users.

b. City Governance

The ‘Theme and Code Presence’ table in Appendix 4, shows an interesting trend in the data. While the government was only involved in the launch of the project and putting into place business regulations used to promote investment, local end-user stakeholders

still perceived that they are managing the project. This was quite evident in the coding as can be seen from the following examples:

“The primary people developing this project is the government, they are the ones that announced the project. They promoted it as their initiative to build much needed new cities to the country”

(Interview 40, Academic, Character Position: 1480-1673)

“KAEC is a government project with factories and a lot of opportunity for investment in real estate and jobs”

(Interview 18, Professional, Character Position: 616-723)

On the other hand, people who had visited the project had a clear idea about the involvement of the private developer EEC who is actually managing the project. Again, this impression was based on the strong branding done at the launch by the government and people’s trust in them. That said, the government has had little involvement in the project past the launch in 2006 other than developing business regulations and incentives. In the ten years since the project was announced not one public building, be it school, hospital, ministry building, police station, or mosque, has been built in the project. There are no police on site as EEC manages security internally. Government employees working on the project commute daily from Jeddah and work out of offices in the BayLaSun business area. The only physical contribution made by the government was the city-scale train station being built on the edge of the project. This can be attributed to the lack of coordination between government organizations as SAGIA and later EEA both only had a business focus on the project and no direct link to other government bodies. This lack of commitment to integrate the city into the structure of the public government sphere of influence makes the project look like a completely private entity lacking authenticity and not an actual city.

c. Temporal Dimension

Another identified sub-theme that showed high occurrence in the data was the issue of time discussed in detail in chapter 4 as a core component of the conceptual framework.

Participants in the study reported clear distinctions between the shift in the communicated message from city and future, to investment in sales. As various participants have stated:

“In the beginning there was a huge propaganda launch, there was so much information and reports that supported the concept”

(Interview 40, Academic, Character Position: 20-142)

“When the project first started I felt that the marketing was a lot stronger than what they are doing now, they used to focus on the city, its future and the vision of the project instead of just pure sales”

(Interview 26, Professional, Character Position: 1630-1835)

“It started strong in the beginning they had some problems due to investment numbers and implementation but later picked up pace again”

(Interview 21, Professional, Character Position: 727-862)

Clearly many stakeholders were aware of the project’s development over time but could only see short-term goals that focus on attracting investment and selling residential property and land as opposed to long term planning. Again, the authenticity of the project (sections 3.3.2 and 4.4) and the credibility (section 6.3.1) of the developer came into question. There has to be a consistency in communication that builds a sense of trust with stakeholders, a stream of messages that correlate with actions on the ground. Something that EEC has so far failed to accomplish.

d. Authenticity

The final identified sub-theme that showed high occurrence in the data was the concept of ‘authenticity’, which is a major component in the development of place branding (sections 3.3.2 and 4.4). It involves building a realistic impression of the city to foster trust with target users. It is further correlated strongly with ‘Brand Sentiment’ and to a lesser extent with ‘City Sentiment’ and “Social Development’ discussed in detail in section 8.3.2.1 and 8.3.2.2. As one participant commented:

“People don’t have a realistic impression of the future of the project. The impression in the general public is that there are investment opportunities and sales but not the real value of the project”

(Interview 21, Professional, Character Position: 1903-2102)

This impression mainly stems from the slow development of the project, lack of clear and consistent communication, and a focus on investment and sales as opposed to the city, people, and community. This is further exacerbated by the very positive narrative being communicated to stakeholders by EEC employees, as one participant in the study commented:

“When you talk to the people at the city they give you this story about how incredible this is, but under the surface it’s not”

(Interview 11, Academic, Character Position: 436-561)

This attitude is more akin to a real estate sales pitch than an entity that is developing a city and was prevalent in meetings with EEC officials during the data collection process and at sales events. The main reason the project has done so well from an investment perspective is that they were providing a strong business deal that they communicated clearly. But when it comes to a city, they cannot communicate what they do not have and what they are not doing. They have also shown little inclusion, transparency, or accountability in their development, financial, and planning process, again elements that are fundamental parts of place branding development. Additionally, the financial problems that plagued the project in 2010 and the subsequent bailout mentioned in chapter 6 all affected EEC’s credibility with local stakeholders. Their main advantage has been people’s trust in the Saudi Arabian King and government, which gives EEC and the project credibility by association.

From another perspective naming the project ‘King Abdullah Economic City’ further helped the credibility of the project. The use of King Abdullah’s name for the city linked the project with the loyalty and respect stakeholders feel for their leaders in the country. As one participant stated:

“I do believe in the project and it must be supported to help the county develop. It is imperative for it to succeed because it holds the name of the King and is his legacy”

(Interview 23, Professional, Character Position: 1275-1448)

Even the use of the term ‘City’ in the title builds connotations that it is presently an actual city. As noted in section 8.2.2, what does the use of the word ‘City’ really denote? As of 2014, KAEC was still a project with less than 15% completed and few permanent residents (KAEC, 2014). Examining sentiment excerpts for both city and brand resulted in 78 occurrences of the word ‘The City’, and 10 occurrences of ‘KAEC’ as opposed to 32 references for the term ‘The Project’. This is not an indication of positive or negative sentiment but a sign of people’s unconscious association between the name of the city and a concept or potential that has yet to materialize. Consequently, there is power in naming a place, even if the name doesn’t reflect reality as it links to a perception of authenticity that is not substantiated. It absorbs direct stakeholders under one entity, raising their social value by linking them to the King. This complex association between a name, a concept, and a place is imperative in the creation of brand identity in new cities and is a fundamental element in the development and place branding process.

8.4 Summary of Main Findings

The main findings from this section can be summarised in the following points:

From a City and Brand Sentiment perspective:

1. General awareness and sentiment of the KAEC project was initially strong but has become weaker as the project shifted focus to economic goals.
2. Accreditation through loyalty to the King and government reflects how public opinion is shaped in Saudi Arabia. This has further influenced people’s impression of the physical components of the city and its success at attracting investment.
3. Some groups in the country such as younger generations, aspire for a less conservative country and see development as a means for change.

4. There is a negative shift of trust as the project moved away from core city values and people to economic goals causing a lack of authenticity.
5. There is a local hesitance to trust or invest in long-term projects in Saudi Arabia because of the weak track records of such developments and the political and financial uncertainties that face the country.
6. KAEC brand sentiment has been shown to be weak, as little has been done to promote the city concept past the initial launch of the project.
7. The shift to economic goals is seen as a failure on the part of EEC to develop a city concept and has reinforced the perception that they are only a real estate developer focusing on sales.
8. The inconsistency between communication message and development causes a lack of authenticity that negatively affects the project.
9. The top-down decision-making process prevalent in the county has affected implementation and caused a lack of transparency and accountability.
10. There are subtle signs that the involvement of special interest groups and corruption has had an adverse effect on the project.

From a development perspective:

1. Social development is important as urban development in the context of building new cities and their branding.
2. Communication focus should be on people and social development as opposed to sales and investment.
3. There is a focus on affluent levels of society and a sense of exclusivity that is being projected and implemented in the KAEC project.
4. The disregard for social focus in the development process is perceived as a push to shift from local traditional cultural and religious values towards generic international lifestyle elements.

From a city brand perspective:

1. The economic focus of KAEC's communication conflicted with the original social message promoted by the Saudi government.

2. The sales focus has led to a loss of trust in EEC, which has reflected badly on city and brand sentiment.
3. The value of social connections and word-of-mouth in the branding process of KAEC to Saudi end-users

From other perspectives:

1. Many stakeholders believe that the government are responsible for the project and its performance as opposed to EEC.
2. There is a perceived lack of commitment to integrate the city into the governments sphere of influence which makes the project look like a private entity.
3. Authenticity of the project is perceived as weak as little effort has been placed to develop a city as opposed to sales.
4. There is little inclusion, transparency, or accountability in the development, financial, and planning process of the city.
5. The financial problems that faced the project in 2010 affected EEC's credibility with local stakeholders.
6. Naming of the project "King Abdullah Economic City" has helped the credibility of the project as it links with the loyalty local stakeholders feel for the government.
7. The complex association between a name, a concept and a place is directly linked to the creation of a place brand in new cities.

8.5 Conclusion

The previous analysis highlights the use of place branding in the development of new cities. While the analysis abstracts and simplifies the process, it provides insights on the challenges involved in place branding such as politics and power, stakeholder involvement, and long vs. short term planning and development goals, all of which will be discussed in more detail in the coming chapter. While these elements highlight the complexity of the process in general, they also provide focus on how to develop and use branding strategies in city projects such as KAEC. The varied stakeholders and multiple objectives being targeted means that the development of strong branding strategies is a complex endeavour. These approaches can only be successful if they work to support, complement, and enhance existing development programs through a unified decision making process that is adjusted over time as a city takes form. The study shows that this process is still weak in the KAEC project as branding is mainly used to address short-term benefits, rather than a means to achieve unified long-term development or holistic branding. This absence of strategic awareness, lasting vision, and planning could lead to the creation of generic cities that have little substance.

The KAEC case further shows that the actors with the most influence on the branding process, in this case the local developer EEC, struggle to manage the complex nature of developing a new city. This mirrors the literature, which identifies top-down government structures and fragmented cooperation between entities in the developing world as major challenges to implementing effective place branding practices (Björner, 2014; Wei et al., 2006). By contextualizing discourse analysis research within an ANT-based exploration of the KAEC brand's development in Saudi Arabia, the study highlights the meaningfulness of a place brand construct in the process of city creation. This is particularly evident for cities with little or no built form. This further resembles Therkelsen's (2010:140) concept of a 'city of words', a symbolic representation of place that is not accompanied by physical form, or a 'city of stones'. In other words, the study highlights the uneven debate about place branding in absence of any physical urban form. The following chapter will take this analysis further by identifying and discussing the key findings of the study and how that relates to and validates the conceptual framework developed for this study.

Chapter 9 Research Findings and Testing

9.1 Introduction

This chapter provides an overview of the research findings outlined in the image representation analysis, the public and social media analysis, the ANT analysis, and finally the interview analysis outlined in chapters 7 and 8 of this study. These initial findings address the research questions identified in chapter 3 from multiple micro and macro perspectives. To make sense of the different viewpoints, this chapter will first categorize the findings into more generalized areas of focus based on the identified research questions and then explore the theoretical implications of each group to build insights on the development and branding process in the specific context of Saudi Arabia. The chapter will then go on to outline the testing process using a focus group concentrating on the conceptualization of the branding process in Saudi Arabia. Finally, it will review and adjust the conceptual framework developed in this study to better reflect the nuances drawn from the data analysis, findings, and testing.

9.2 Consolidation and Discussion of Findings

Each research question identified in chapter 4 looks at a specific facet of the branding process. These questions were:

1. What is the relationship between the development of new cities and place branding theory?
2. How does this relationship manifest in Saudi Arabia's new city initiatives?
3. What are the critical elements that must be taken into account during the process of branding new cities in Saudi Arabia?
4. How do different actors influence the development of place branding in this context?
5. How do we address the temporal dimension of branding in new cities?
6. What role do concepts and ideas play in the process of branding new cities in Saudi Arabia?

Subsequently, each question can be abstracted into a general area of focus that can later be used to link findings with related theory. While all areas are important to the overall conceptualization of the place branding process, additional focus was placed on critical attributes that deviated from the literature as they reflected Saudi Arabia's unique social, economic, and governance context. 33 findings consolidated from each analysis type in chapter 7 & 8 were then aligned with the research questions to identify key areas that directly portray the development of place branding in the country's new cities. The following table shows the alignment of findings to research questions (RQ):

Analysis type	ID	Findings	Link
Image and Media Analysis	IM1	Shift from city core values to economic goals.	RQ2, RQ3
	IM2	Focus on luxury, affluence and exclusivity as opposed to affordability and inclusion.	RQ2, RQ3
	IM3	Relationship between transparency and accountability and communicating a brand message.	RQ1, RQ3
	IM4	The use of word-of mouth and social media in building city brand.	RQ3
	IM5	Weak performance in utilizing visual, print, and social media in communicating the public image of the project.	RQ3
ANT Analysis	A1	Successful branding is actor driven through a unified message and centralized control.	RQ1, RQ4, RQ3
	A2	When there is no main actor driving the brand or when multiple actors are in conflict, the communicated message is fragmented and weak.	RQ4
	A3	There is a distinction between the development of an investment brand and a holistic city brand for KAEC through the main actors involved in the process.	RQ2, RQ4
	A4	A place brand becomes can become more important than the city it represents and can embody it with the power to enact change.	RQ1, RQ4, RQ6
	A5	How communication messages evolve or change over time influence how a place brand is perceived.	RQ1, RQ5
Interview Analysis (Sentiment)	IN1	The shift of focus to economic goals has weakened awareness and sentiment for KAEC.	RQ2, RQ5
	IN2	Accreditation reflects how public opinion is shaped in Saudi Arabia.	RQ2, RQ3
	IN3	Younger Saudi Arabian's aspire for a less conservative country and see development as a means for change.	RQ2, RQ3
	IN4	The shift of focus to economic goals has weakened brand authenticity for KAEC.	RQ2, RQ3, RQ5
	IN5	There is a local hesitance to trust or invest in long-term projects in Saudi Arabia because of the political and financial uncertainties that face the country.	RQ2, RQ3
	IN6	Weak KAEC brand sentiment as little has been done to promote the city concept past the initial launch of the project.	RQ5
	IN7	The shift to economic goals is seen as a failure on the part of EEC to develop a city concept and the perception that they are only a real estate developer focusing on sales.	RQ2, RQ3
	IN8	The inconsistency between communication message and development causes a lack of authenticity that negatively affects the project.	RQ1, RQ2, RQ3

	IN9	The top-down decision-making process has affected implementation and caused a lack of transparency and accountability.	RQ4, RQ3
	IN10	There are signs that the involvement of special interest groups has had an adverse effect on the project.	RQ2, RQ4
Interview Analysis (Development)	IN11	Social development is important as urban development in the context of building new cities and their branding.	RQ1, RQ2, RQ3
	IN12	Communication focuses on sales and investment instead of people and social development.	RQ2, RQ3
	IN13	There is a focus on affluent levels of society and exclusivity that is being projected and implemented in the KAEC project.	RQ2, RQ3
	IN14	The disregard for social focus in the development process is perceived as a push to shift from local traditional cultural and religious values towards generic international lifestyle elements.	RQ1, RQ2, RQ3
Interview Analysis (Identity and Image)	IN15	The economic focus of KAEC's communication conflicted with the original social message promoted by the Saudi government.	RQ4, RQ5
	IN16	The sales focus has led to a loss of trust in EEC, which has reflected badly on city and brand sentiment.	RQ3
	IN17	The value of social connections and word-of-mouth in the branding process of KAEC to local end-users.	RQ3
Interview Analysis (Identity and Image)	IN18	Many stakeholders still believe the government is responsible for the project and its performance as opposed to EEC.	RQ2, RQ3, RQ5
	IN19	There is a perceived lack of commitment to integrate the city into the public government sphere of influence, which makes the project look like a private entity.	RQ2, RQ3
	IN20	Authenticity of the project is perceived as weak as little effort has been placed to develop a city as opposed to sales	RQ2, RQ3
	IN21	The financial problems that faced the project in 2010 affected EEC's credibility with local stakeholders.	RQ2, RQ3, RQ3, RQ4
	IN22	Naming of the project "King Abdullah Economic City" has helped the credibility of the project as it links with the loyalty local stakeholders feel for the government.	RQ3, RQ6
	IN23	The complex association between a name, a concept and a place is directly linked to the creation of a place brand in new cities.	RQ1, RQ3, RQ6

Table 9-1 Alignment of findings to research questions

Based on the above alignment of findings to research questions, we can deduce three main areas of focus that are critical to the branding of new cities. These are:

1. Urban, social, and economic development, addressing research question 1 and 2.
2. Place branding policies and procedures, addressing research question 3.
3. The use of actor-network theory in the place branding process addressed in questions 3, 4, and 5, and focuses on actors, the temporal dimension, and concepts associated with the place brand.

While all three areas are strongly interconnected, the findings have shown a clear focus on both the development process of the city and the critical elements that drive place branding, factors that are strongly represented in the conceptual framework developed in chapter 4. Further focus on the different actors involved in the process, the temporal dimension of place branding in new cities, and finally the abstract concept of city and its ramifications on the overall process were found to directly influence what is being developed and how it is being branded over time. The consolidated findings of each area will be discussed in detail in the following sections.

9.2.1 Urban, social, and economic development discussion

The analysis and findings have shown that while the development of economic elements in KAEC have shown success, weak effort has been placed on the city development and the social components in the city. This lack of proper planning demonstrates a major flaw in the creation of physical form and has subsequently influenced the development of the city's place brand. As mentioned earlier in chapter 2, "the process of modernization in Saudi Arabia is largely physical and heavily imitative of western model's external departments and lifestyles" (Fraser and Golzari, 2014:63). While the country's development practices have shown the ability to adapt, and develop based on Saudi terms (Jordan, 2011), they still repeat many of the same mistakes that have accompanied the globalization process in many other countries in both the developed and developing world such as urban sprawl, polarization, quartering of urban space, and graduated sovereignty (Ong, 2006; Moulaert et al., 2003; Sassen, 2001; Marcuse and Kempen, 2000). What is even more alarming is that the new cities being developed in the country have also shown early signs of similar elements, if not to a greater and more purposeful degree. KAEC still reflects a level of planning simplicity that is sales based and does not incorporate recent developments in city design.

While technology and smart city solutions were touted as fundamental in the development of KAEC, little can be seen to support this assertion in the elements that have been completed or in participant awareness of their existence. This is a divergence from the high-tech message that was initially promoted by the government at the city's launch and the innovative use of holograms that captivated the interest of both the Saudi and

international community. In the age of globalization, technology has become the backbone of competitive advantage and one of the main drivers for success (Narula, 2014). In the development of new cities, it becomes one of the primary actors in shaping urban form and public opinion. Unfortunately, KAEC has deviated from this goal to become a cohesive city and has become akin to a standard industrial zone/estate accompanied by a conglomerate of smaller real estate projects. It is missing a sense of civil society that represents autonomous networks that act independently of the developers/managers of the project. Moreover, the city reflects many of the failed practices in existing Saudi Arabian cities such as density patterns and the development of public spaces that have all but destroyed the urban and social fabric developed over centuries (Yamani, 2000; Madanipour, 2010).

From an urban development standpoint, the findings show the city shifting in its development from core city values such as people, innovation, and improved quality of life to economic goals that have caused a general lack of authenticity and public trust. Instead of focusing on inclusion and affordability, they promote a sense of affluence that fundamentally excludes many local and international segments of Saudi Arabian society. In a sense promoting a type of ‘new-built gentrification’ on a city level (Davidson and Lees, 2010; Rérat et al., 2010). This has led to a strong perception that mistakes were made early on in the planning and development of KAEC. The city was initially master-planned by SOM, a reputable international design firm with a history of successful projects (EMMAR, 2014). Furthermore, the private developer EMMAR has extensive experience in building mega-projects in the region. While the project was hampered by financial and implementation difficulties that coincided with the financial crisis of 2008, Saudi Arabia wasn’t directly affected by the global downturn, on the contrary, many investors saw the country as a stable investment opportunity and showed interest in the project. Little on the surface explains why the actual planning of the city shifted focus so profoundly to real estate sales or why the project struggled for years after the launch. Looking deeper into the findings of the study we see patterns that start to answer these questions and link directly to KAEC’s branding performance.

Being a ‘greenfield’ or new development with no prior existing urban form, KAEC was initially actor driven from the onset of the project. As outlined in the ANT analysis in chapter 8, various key actors were involved in the project over different stages of its

development, each with their own set of objectives. This shift moved from higher levels of Saudi leadership to government investment authority control and finally to the project's private real estate development partner, EEC. In the initial phase of this process, higher government including the direct support of King Abdullah of Saudi Arabia drove the project. This vision was directly linked to providing a better quality of life for the country's growing population after a long period of stagnated growth. This was envisioned through the development of modern cities that would become the new centres for diversifying the existing oil based economy through new industry segments and attracting FDI. King Abdullah's drive to improve the country on ascending to the throne in 2005 built a sense of trust with citizens, something that was strongly mirrored in the findings as accreditation through respect and loyalty to the King reflects how public opinion initially shaped KAEC's development.

Looking deeper into the goals that have shaped economic and urban development in Saudi Arabia, one starts to perceive other forces at play. The interviews and media analysis allude to the existence of special interest groups that work behind the scenes in the Saudi Arabian government and private sector, elements that strongly influence large projects in the country. Furthermore, the very nature of the Saudi Royal family succession is built on a system of alliances that in some cases supersedes national or developmental goals (Stenslie, 2012). This directly mirrors the view discussed in chapter 2 that politics and not economics was the main driver for economic development in the Middle East. As Henry and Springborg (2010:3) state, "Political rather than economic factors have been the primary cause of the rate and method by which countries of the region have been incorporated into the globalized economy". Kavaratzis and Kalandides (2015) go further by considering place branding to be "a highly selective political process". These perspectives are essential to understanding some of the possible motivations behind the development and branding of Saudi Arabia's economic cities as comparisons to similar initiatives in places such as Asia and Africa can be made (Goldman, 2011; Li et al., 2014). Marcinkoski, (2016:42) in his book 'The City That Never Was' explores new city development from this perspective and states that "the driver of this urbanization is neither the social demands of a population nor the emergence of market demand. Rather, these initiatives represent the ambitions of politicians to project stability and investment potential through the production of built form, in the hopes of inducing foreign ventures into an emerging economy" (Marcinkoski, 2016:42). In Saudi Arabia, this push to enact

change by new leadership under King Abdullah was translated into massive development initiatives such as infrastructure, education, healthcare, and new cities. Politically it was a way of projecting stability and cementing leadership and loyalty. But this practice also had financial implications; large-scale projects also meant expenditure of capital with little control, transparency, or accountability in place. A theme that was prevalent in the findings.

Lefebvre (2003) also explores this concept further by viewing urbanization as more than just a product of capital, but as a medium to create the possibility of capital. In many instances this refers to the focus on land speculation, a strategy that has traditionally driven capital accumulation and private investment in Saudi Arabia (Abdulaal, 2012; Abou-Korin, 2011; Fatta, 2014). However, this is nothing new, even the UK's new town initiatives in the 1950s focused on the increase of land value as a mode of returns (Council, 2015). Marcinkoski, (2016:18) defines speculative urbanization as "the construction of urban infrastructure or settlement for political or economic purposes, rather than to meet real, as opposed to artificially exaggerated, demographic or market demand. It also includes the legislative re-designation and re-parcelisation of land to increase its monetary value" and views it as "the preferred instrument for economic production and expression for political power in both established and emerging economies", a trend that he sees as reoccurring as developing countries build large-scale urban projects and is possibly a factor in the volatility of their success.

Additionally, KAEC primarily focuses on affluent levels of society and have promoted a sense of exclusivity in the development of new cities. This new-build gentrification trend is strongly linked with speculative urbanism and the developmental state (Shin and Kim, 2016). Saudi Arabia has a history of implementing such gentrification policies in many of its existing cities (Elbelkasy et al., 2015). An example is the expropriation and demolition of the historic districts of both Makkah and Medina to expand the religious sites and build large-scale hospitality developments causing the displacement of low-income residents while making the area exclusive to a more affluent level of visitors. The use of new-build gentrification strategies in new cities (Shin and Kim, 2016) further supports the argument that EEC is exploiting the project to create economic value. The city promotes itself as being the world's first publicly listed city (EMMAR, 2014). But again, it is not the city that is being publicly traded, it is EMMAR the Economic City

(EEC), the private developer of KAEC. It is this focus on economic, speculative, and new-built gentrification goals that seriously raises questions about the motivations behind the project. This is further exacerbated by the Saudi Arabian government's limited perceived involvement in the project past its launch, its changing investment regulations, and their lack of commitment to integrate the city into the government's local and national development plans. While this can be due to a weak institutional environment, it ultimately makes the project look like a private endeavour and not an actual socially inclusive city.

From another perspective, findings suggest that EEC has failed to put into place the seeds of social development. The above discussion on KAEC's urban development activities highlights different aspects of the development process, especially the shift from core city values and national level goals to economic goals. But this investment focus has not been accompanied by a clear strategy to attract local residents to the city. Moreover, little has been done to provide services or public facilities to support a community in the city. Much of the goodwill towards the project comes from either investors that see the industrial and logistic elements of the city as beneficial to their business or to Saudi Arabian citizens who believe in the project as it is directly linked to King Abdullah and the Saudi government. This accreditation through loyalty reflects how public opinion is shaped in Saudi Arabia. This has further influenced impressions of the physical components of the city and its success at attracting investment. Yet with time, and the passing of King Abdullah in 2015, this sentiment has been considerably diminished. This highlights two important factors in the development of new cities, the need for direct involvement of the public sector in the development of new cities and that accreditation builds trust and authenticity and subsequently generates interest and spurs growth. But accreditation only goes so far in building authenticity.

To encourage people to move to a new city means providing the facilities they need, both physical and social. While the port and industrial elements of the city create jobs, they both focus on a migrant workforce and not Saudi citizens. More employment anchors need to be in place to bring in a more diverse segment of Saudi society. In addition, once there, the main necessities of life also have to be in place and allowed to grow organically through civil society involvement. However, there is a limit on how far autonomous development can be fostered in a society that limits the involvement of different

stakeholder groups either consciously or unconsciously. That said, the study shows that effort must be placed to encourage this type of participation as it could act as an important aspect of community formation and cohesion. Without these elements in place it will be unlikely that many people will see KAEC as an opportunity to provide a better life for their families. At the same time cost becomes a defining factor. The American “build it, they will come” approach (Brooker, 2012) can only go so far, especially when developing on a city scale.

Finally, the disregard for inclusion in the development process is perceived as a push to shift from local traditional, cultural, and religious values towards generic international lifestyle elements that reflect affluent levels of society and a sense of exclusivity. But a city isn’t just made up of the rich; on the contrary the majority of residents in Saudi cities are economically from the middle and lower classes (GAS, 2016). Then why focus on the few instead of the many? The affluent segment of society who have the least motivation to relocate to a new development with little existing urban form, services, or social fabric? The discourse above on speculative urbanism can be a part of the answer, but the issue is more complex as many different actors with conflicting objectives are involved in the process of development. From another angle, Saudi Arabia’s unique social class culture directly influences what is being developed and how it is communicated. But this is not to say that cities such as KAEC are not developmentally viable from an urban or social perspective, but rather that mistakes are being made in their planning, implementation, and branding process that need to be addressed.

Additionally, effort must be placed to educate and align public perceptions with realities of an inclusive and diverse society. This section has touched on multiple topics related to the development of KAEC and the subsequent associated brand. It has attempted to highlight the implications of development on the place branding process to answer the first and second research questions ‘What is the relationship between the development of new cities and place branding theory?’ and ‘How does this relationship manifest in Saudi Arabia’s new city initiatives?’. During the exploration of answers, it has highlighted the reciprocal relationship between the two elements and the importance of social development in new cities and their branding. Here stems the problem of KAEC’s brand identity. Place branding starts with action. Without proper urban, economic, and social development, as well as a rigorous system of transparency and accountability,

authenticity cannot be achieved or maintained. As the analysis has shown that authenticity is directly related to the success of place branding initiatives in new cities, proper planning becomes the cornerstone of good development and subsequently place branding as there is little or no urban form in the early stages of new city development. While development is ultimately the foundation of the brand, the following sections will explore additional facets of the process through the lens of place branding, actors, and concepts.

9.2.2 Place Branding policies and procedures discussion

As the relationship between development and place branding in the previous section has been shown to be strongly reciprocal, authenticity of development should be mirrored by an authenticity of message, something that has not been done in the branding of KAEC. This is even more important in new developments as little urban form exists and the pace of development is uncommonly fast. The findings highlight the shift in branding message from core city values to economic goals. This again has caused a general lack of authenticity and public trust in the project. Instead of focusing on inclusion and affordability, the message, while somewhat aligned to the planned development, promotes a sense of affluence that contrasts with the initial goals announced for the city.

Going back to the literature, branding has been found to have very negative public connotations as it is perceived to reflect self-promotion and economic gain (Ooi, 2014). Hence there is a need to develop a level of trust with end-users that highlights the complex nature of cities. In the context of new city place branding in Saudi Arabia, achieving authenticity closely followed the writings of Pasquinelli (2014) on how to build a distinctive brand. In KAEC, this was initially achieved by using a strong vision and accreditation by the Saudi Arabian King and government. In a way, it was used to separate the dream from the achievable reality in the eyes of the public through existing trust, something that is an important cornerstone when developing integrated branding strategies for cities (Berg and Björner, 2014). The findings further emphasise this point as the initial positive sentiment persisted long after the government turned over control to the private developer of the project. Although trust and accreditation have been shown to be important in the context of place branding in Saudi Arabia, they are not enough to maintain a consistent or positively evolving brand identity.

With the shift in power also came a change in the message being communicated to the public, highlighting a clear distinction between the holistic city brand that was initially used to promote the city and its core values to one that was based on sales and economic gain. While the reasoning behind such a shift was reported to be financial in nature, it greatly damaged the project's public image. This can possibly be explained by Ashworth and Voogd (1990) as a way of strengthening the role of place as a product to be commoditized and marketed, directly linking the process to globalization theory and how cities resort to changing their image to target external consumption (*ibid*). This is strongly felt in new city projects such as KAEC where they have focused on attracting investment and selling property in lieu of dealing with the complex nature of developing vibrant urban form and community. This has further caused the development of multiple place brands, each targeting different segments, ultimately weakening the overall brand identity of a project.

Predictably, the project has shown success in developing a strong investment brand that continues to attract much local investment and FDI. What this means is that entities in Saudi Arabia are more comfortable with dealing with straightforward economic scenarios than socio-cultural complexities. This further highlights the significance of a city's role as an economic actor which directly links to Porter's (1990) theory on competitiveness and theories on city positioning, benchmarking and segmentation (Berg and Björner, 2014) mentioned in chapter 3. While it is not wrong to follow a differentiation strategy (Ashworth and Voogd, 1990), the issue here is that they have neglected target-markets that are perceived to be difficult or costly. Success ultimately comes down to developing a strong organizing capacity as different groups control individual urban products and services and have a stake in KAECs branding efforts. To bring these actors together requires strong managerial and administrative control. While specific key elements such as a unified vision of urban development, the ability to develop strategic networks, and strong leadership have been identified that make this possible (Van den Berg and Braun, 1999), KAECs brand management has shown mixed results in achieving these goals. Again, this mirrors the literature, which identifies top-down government structures and fragmented cooperation between entities in the developing world as major challenges to implementing effective place branding practices (Berg and Björner, 2014).

But this is nothing new, Kotler, as far back as 1993, highlighted the importance of a strong sense of agreement and teamwork between the different actors in a city and the regular evaluation, improvement, and adaptation of a strategic marketing plan. More so it also reflects on the shortcoming of the development process that directly influences city branding efforts. To address this inadequacy, both public and private entities managing KAEC must re-evaluate how government links to development partners such as EEC. Decisions need to be made in tandem in both the short and long term for such public-private partnerships to succeed. This recommendation strongly reflects Govers and Go's (2009) three-gap system of branding that focuses on image creation through strategy, performance, and satisfaction. Alternatively, the strategic branding communication described by Kavaratzis (2004), which focuses on identifying a city's core brand values to define a city's positioning and identity to reach the elements that make it unique, would not work well in the Saudi Arabian environment as it assumes that there is an efficient existing system already in place. While both perspectives are important in the branding process on different levels, what is clear is that traditional marketing structures are now strongly linked to city planning and governance practices (Kavaratzis, 2007). This means that the success of these projects and subsequently their branding is based on the governance structures that have been used in their implementation, both from a development and branding perspective.

While PPPs have shown success in Europe and North America, they have struggled in the developing world (Osborne, 2002). Osborne goes further to state that "Political systems and culture act as considerable obstacles despite the apparent impact of the homogenization of public and social policy implicit in economic globalization" (Osborne, 2002:144). As governments prioritize economic development, these partnerships marginalize social objectives and culture (Kavaratzis and Ashworth, 2015). This is evident in places like Saudi Arabia where the monarchical system of government lacks strong social participation, transparency, or accountability, all elements that have been highlighted in the findings. The resulting PPP relationships, such as the one formed to develop KAEC, is highly dependent on governmental support and cooperation. Study findings have shown that the Saudi government, embodied first by SAGIA and then ECA, gradually withdrew their support for the project after the strong launch. Furthermore, it has done little to regulate the project directly or link it to national developmental policies, elements that are considered critical for the success of a PPP relationship (Jamali, 2004;

Trebilcock and Rosenstock, 2013). While regime change resulting from the passing of King Abdullah is another possible factor for the lack of strong support for the project, interviews with government officials have shown that the shift in policy was more related to restructuring of governmental bodies and leadership under King Salman than any direct opposition to the project. That said, this deficiency in involvement has had a direct impact on the branding of the project. As Björner (2014) mentions, government stakeholders have the greatest influence on the branding process. This means that shifts in government such as those that happened at the passing of King Abdullah could have a direct impact on place branding. More so, the findings have shown that their control over the branding process is imperative to its success as private actors are negatively perceived as only being interested in sales and profit. Therefore, government must take the lead in communicating the KAEC brand to the public.

Björner (2014) stresses that with these global changes in technology and communication; top-down approaches to branding are no longer viable. Cities must embrace new realities that are shaping the world today and find new ways to include all public stakeholders in the process to develop relevant branding strategies. This means that globalization factors such as the increased use of the Internet and the popularity of social media have become essential in the place branding process and how it develops over time. While the findings have highlighted weaknesses in governance and development of KAEC and how that has directly affected the branding process of the project, on a secondary level it has validated much that has been written in the literature on the development of a place brand itself. In an effort to position the city both regionally and internationally, KAEC has adhered to global visual standards in its development. Unfortunately, this has been done without sensitivity to the uniqueness of place or local values and has resulted in a city that has little unique identity, a mistake that is often committed in city development (Pasquinelli, 2014), and is an even larger issue in new cities as brand identity is being created in tandem with development. Designating the city as ‘economic’ to build competitive advantage has also reduced the uniqueness of the KAEC brand as the findings validate the inappropriate use of global associations with themes that focus on one core element to distinguish themselves instead of developing a comprehensive identity based on multiple core elements and values (Ren and Berg, 2014; Fan, 2014).

The question that comes to mind then is what have EEC done wrong? The previous section has highlighted many of the specific factors that have contributed to the failure of KAECs holistic place brand. But how do we categorize these challenges into clear reasons? Ashworth (2010) sums this up by relating the ability to brand a place based on a series of questions that should be first answered. These questions revolve around the essence of place branding and can be categorized into three groups, product, planning, and managerial requirements. KAECs main problem stems from its product itself, As Ashworth states, branding should be conducted “If the product is good enough” among other things (ibid:252). From the above discussion, KAECs branding in terms of a business opportunity was a success. This is because the investment product was straightforward, competitive, and was constantly improving. Organizational and managerial structures were in place with little risk and a strong likelihood for success. Basically, the product was good enough, they knew what they were doing, what problem they were trying to solve, and had a strong plan on how to achieve it. On the other hand, the holistic place product was ill-defined, too complex, and the actors involved had conflicting goals, all reducing the chances of success. As Ashworth states “branding works only when all the other conditions for success are already in place” (Ashworth, 2010:251) which validates our finding regarding development and place branding strategies in new cities.

While this section has explored the development of place branding in KAEC and how that relates to the literature on the topic, it has further identified various key elements that must be taken into account during the process of branding new cities in Saudi Arabia. The following sections look at the actors involved in the process in more detail. It further discusses the theoretical implications of how a brand is created and the power it extrudes through the process of place branding.

9.2.3 Actor-network theory discussion

The previous two sections have touched on the influence of different actors and their specific objectives on place branding in KAEC, albeit through the specific perspective of the development and place branding process. From an ANT perspective, the findings mirror the literature in identifying the shift in focus from the city to the entities that control the development process and the messages that are used to convey a specific purpose and

build a specific place brand (Ren and Berg, 2014). This is only possible as KAEC is in the early stages of development and has yet to develop any substantial urban form or community. The use of a differentiation strategy by main actors in the process has resulted in the development of two distinct brands, holistic and investment, with only a weak connection between them. While the reasons behind this strategy has already been discussed, ANT has been useful in tracing the enactment of different goals and objectives by various actors. This is nothing new as ‘Agency’ and ‘Structure’ models of property development have existed since the 1950s (Healey, 1991). These models go from looking at the roles of actors, their relationships and interests, to the forces that drive this dynamic from the perspective of the urban-political environment (Ratcliffe et al., 2004), elements that are mirrored in actor-network theory. However, KAEC is more than a real estate project being driven by a developer, it is a public-private partnership that is developing a new city. The actors that control the development process are also responsible for building brand (Ren and Berg, 2014). To understand the complex nature of new cities it is crucial to recognise the different relationships that exist between both human and non-human actors, something ANT allows us to do. The findings show that the theory was useful in tracing the relationships that are strongly contingent on social processes such as building public perceptions of KAEC and the interplay between power and identity, something that was mirrored in the literature by Michael (1996) and Post-ANT theories that, shift focus from objects to actions, and from actors to possibilities of enactment and performance (Vikkelsø, 2007). In essence a shift from material objects and the physical form of the city to semiotic concepts that signify the city in the eyes of the public.

In new developments, the concept of place brand becomes more important than the planned city and can embody it with the power to enact change in the physical and social fabric that is eventually produced. Furthermore, this constructed image may surpass the actual reality of the city and is a strong component in shaping user perceptions (Deffner and Liouris, 2005). In the case of KAEC, the investment brand has transcended the actual actions of the city development, but as target market expectations have been reached, in this case investment and industrial sales, the branding effort for this segment is deemed successful (Kotler et al., 1999). Alternatively, in lieu of the slow physical and social development process, negative local perceptions affect trust and involvement in the project and stifles people’s desire to invest or relocate there. This is not saying that the city brand drives success but that having a positive brand in early stages of the

development process is imperative to building the possibility of success. In the argument about what comes first, in the specific context of new city development, a place brand is the prerequisite of physical form.

As a brand is a social construct, all stakeholders involved in the process, to a certain level, can affect the meanings associated with the development and use of a place and subsequently the resulting place brand. That said, actors have differing degrees of power in affecting both a places' physical form or identity (Hayward, 2013). What this means for KAEC is that without a strong brand that stems from core elements such as urban form, proper management, and community involvement, the chances for success in the short term are greatly reduced. While other factors like demand can also affect the process in the long run, the concept of place brand can become more important than the city and can embody it with the power to enact change. Furthermore, the findings have shown the power behind a concept or name such as KAEC. Consequently, there is power in naming a place, even if the name doesn't reflect reality as it links to a perception of authenticity that is not substantiated. It absorbs direct stakeholders under one entity, giving them credibility by linking them to public figures of respect such as the King and government in Saudi Arabia. This complex association between a name, a concept, and a place is imperative in the creation of brand identity in new cities and is a fundamental element of the development and branding process. By conceptualizing objects like the city and semiotic concepts like the brand as equal components in the network, the research explored the capacity for a non-human actor to evolve to different positions of power in the place branding process over time. Finally, while a brand can be encouraged through policy, urban form, events, and designations, it cannot be completely created or controlled, as many elements in a city are left to develop and grow organically. That means that eventually a new city will become more complex and take on a life of its own.

9.3 Summary of Consolidated Key Findings

From the discussion above, various findings have stood out in regards to their importance to the process of place branding in new cities in Saudi Arabia, specifically those that focus on local politics, governance, and drivers behind development. Additionally, many outcomes echo and expand on elements and trends prevalent in the literature. While the

following list is not comprehensive to the findings of the study, it draws out the main themes from the research.

1. The use of place marketing approaches in lieu of place branding strategies weakens the place brand.
2. The relationship between development (urban, economic, and social) and place branding is actor driven and is strongly reciprocal in nature.
3. Social development is equally important as urban and economic development in the context of building new cities and their branding, especially on a nation level such as Saudi Arabia which is strongly influenced by culture, traditions, and social networks.
4. A more representative stakeholder involvement process should be established for nations with less inclusive governance structures to reflect the needs of development and branding and reduce the risk of failure.
5. In countries where development performance is inconsistent, addressing and communicating authenticity is directly related to the success of place branding initiatives in new cities.
6. The urban development process in Saudi Arabia is complex and encompasses different, and sometimes conflicting drivers such as politics, economics, and social elements that must be understood and collectively addressed to drive change.
7. In lieu of inclusion, transparency, and accountability, new city development and branding are being used as mediums for capital accumulation through new-build gentrification as opposed to addressing all levels of market demand in Saudi Arabia.
8. Greater public and governmental involvement in the development and branding process of Saudi Arabia's new cities is necessary as private development actors are negatively perceived as financially driven and subsequently adversely affect the city brand.

9. Saudi Arabia's development and place branding processes adheres to global functional and visual standards with little sensitivity to local needs and values had has resulted in a weak brand identity.

10. Inappropriate use of global categorizations such as 'economic city' that focus on one core element instead of developing a comprehensive brand identity does not reflect the complexity that is involved in the development of new cities and negatively affects the process.

11. Saudi Arabia's social environment and strong rate of technology adaptation have led to the need to understand and utilize appropriate mediums of communication such as local relationships, word-of mouth, and social media in place branding strategies.

12. Understanding the complex association between a name, a concept, and a place is imperative in the creation of brand identity in new cities such as KAEC as it precedes physical and social fabric and can possibly affect their development and form.

To further validate these findings, they were then tested using a focus group and interview approach that will be detailed in the next section.

9.4 Focus Group Testing of Findings

The focus group was conducted on the 18th of April 2016 at the Park Hayat Hotel in Jeddah Saudi Arabia. While the schedule was initially set for a one-hour discussion ending with a dinner, the actual discussion lasted two hours as participants showed strong interest in the topic. Of the six people invited, two cancelled at the last minute while the remaining four attended. The small number of participants reflects typical cultural norms regarding participation in public forums of discussion and commitment to attend such events. The change in number resulted in a change of classification to a 'mini' focus group that can still be used as an analysis method (Greenbaum, 1988). That said, the specialized background of the four remaining participants made the focus group viable as they collectively represented many of the main areas of knowledge related to the research such as planning, urban design, architecture, management, and real estate. In the

following discussion, FGP denotes ‘Focus Group Participant’ and the accompanying number represent each person.

Later phone interviews with the remaining participants, both government officials, were conducted and their input to the findings were also included in the main discussion below under participant 5 (FGP5) and participant 6 (FGP6). All four of the remaining participants were senior professors at King Abdul-Aziz University (KAU) in Jeddah and work strongly with industry as consultants. Participant 2 (FGP2) specifically worked on the design of urban elements in KAEC. All participants at one point were either Deans or Heads of Departments in the Faculty of the Built Environment at KAU. As this focus group was conducted to validate or refute the results of the research, the varied experiences and backgrounds of the participants were deemed appropriate to explore the findings. As the topic is quite specialized, the focus group was designed to revolve around a presentation of the research while encouraging ongoing participation and discussion throughout. While a variety of issues regarding the development and branding of new cities were presented and discussed, ultimately, focus shifted during the group discussion to three questions derived from the findings as follows:

1. If social development is equally important as physical development in the context of building new cities and their branding, why has it been overlooked in the development of KAEC?
2. KAEC’s sales focus leads one to believe that the project is a medium to create capital and not the public goals that have been announced. Do you agree with this statement and if so what do you think are the reasons behind it?
3. The research has shown the power behind a concept or name of a new city such as ‘King Abdullah Economic City’. Do you agree and why do you think people have accepted the term city for a project that has little existing urban form?

Of the four attending participants, three have visited KAEC before for different reasons such as an employment, consultancy, and as a general visitor. The two remaining participants have also visited KAEC on multiple occasions. This varied exposure to the project reflected the previously conducted interviews and assisted in providing a rounded

discussion of the merits and shortcomings of the development and branding process. A full transcript of the focus group can be found in Appendix 5.

The first point of discussion during the focus group was the reasons behind the development of cities such as KAEC in Saudi Arabia. As participant 3 (FGP3) stated,

“how many of these cities were based on ideas and how many of these cities were based on economic concepts”.

(Focus Group, Academic/Professional, Character Position: 3049-3155)

Various factors and perspectives were discussed on what triggers new cities and the concept of human or ‘knowledge’ capital and the global city. The discussion highlighted the need to focus on ‘human’ cities that can create the seeds of vibrant life, something that has become lacking in existing cities in Saudi Arabia. Additional emphasis was placed on the rising trend of ‘smart cities’. The discussion then shifted to the development process itself and the origin paradox; which comes first, people or magnets such as businesses and services, and how do we balance both to create a vibrant but economically sustainable city. There was a consensus that a consistent strategy is what triggers balanced development. A consistency that was lacking in KAEC and casted doubt with various participants that magnets in the city will ever be completed. Unsubstantiated development also was mirrored in the message that was being promoted about the project. Participant 2 (FGP2) described higher management as being,

“very optimistic about the project. You get the feel that the project is amazing, it is so successful. We have done this and done that, and then you go there and you are surprised by how empty it is”.

(Focus Group, Academic/Professional, Character Position: 10810-11009)

This misalignment of development and message and the need for authenticity was one of the key findings of the study and was a strong theme during the focus group discussion. From here the focus group shifted from why cities such as KAEC are being developed to how they are being planned. According to participant 2 (FGP2), the city’s masterplan has been changed four times in the last ten years and up to the time of the focus group, there is no approved final masterplan.

Additional focus was placed on the social aspects of city development. Various participants highlighted the loss of social fabric in modern Saudi Arabian society. As participant 4 (FGP4) states:

“Modern Jeddah has all the problems you are talking about now. There is no identity, no social life, or anything else. You also have to forgive them when they go and establish a new city and it has the same diseases”.

(Focus Group, Academic/Professional, Character Position: 13420-13634)

This was compounded further by the private sector control over the project which focuses on economic gain through sales as opposed to people. There was a consensus that such developments could not be a complete private sector responsibility as their engines always revolve around supply, demand, and economy. As participant 2 (FGP2) mentions:

“EEC unfortunately gauges their success on sales. But where are the people?”.

(Focus Group, Academic/Professional, Character Position: 12663-12737)

This economic driven focus was seen to have roots in the financial difficulties that have plagued the project since its onset. Bad planning, lack of sustainable economic triggers, and no social magnets all resulted in attracting little interest in the project and low revenues. Compounded by the economic crash of 2009, the project was at the verge of bankruptcy. Any effort to focus on people was reduced further to a point that sales was the only goal. As participant 2 (FGP2) states in their defence

“But when someone is drowning they don’t have the luxury of time to discuss all these issues, I need money. I need to pay salaries, they reached this level, leave things like branding for later, let’s eat first”.

(Focus Group, Academic/Professional, Character Position: 24128-24342)

This was clearly mirrored in their shift to sales in the message that was communicated to the public and identified in the findings. The city became an afterthought and the project started to be perceived as a private sector initiative with little government involvement

with the ultimate goal of capital accumulation. During the focus group this seemed to be common knowledge, as participant 1 (FGP1) states that projects such as KAEC were:

“sold to the government” by a major real estate developer and that “real estate speculators started being the dominant force in the decision-making process on the level of a city”.

(Focus Group, Academic/Professional, Character Position: 28447-28502, 28605-28725)

This parallels the findings on speculative urbanism and the varied goals of special interest groups in Saudi Arabia. Furthermore, this also sheds light on the reasons why the development of social fabric and other magnets have been neglected or abandoned in the development of KAEC. As participant 4 (FGP4) states:

Real estate developers have become “the designers of these projects and cities. They dictate what is happening based on their own goals and objectives which are mostly financial”.

(Focus Group, Academic/Professional, Character Position: 28868-29010)

Without strong government supervision the KAEC project has slowly lost the public’s trust. For KAEC, the use of the term city was found to be a way of influencing perception. As participant 4 (FGP4) states:

“this is where a non-professional is using professional terms, a city is a professional term, but he is an average layman, if you show him a district and tell him it’s a city he will say ok. And he will believe in it and defend it”.

(Focus Group, Academic/Professional, Character Position: 31977-32208)

But eventually these misrepresentations will come to light as they are not based on reality or have any clear authenticity. In a way, the KAEC project was used as a medium for image creation, not only for the city or the country, but for the governing regime as Saudi Arabia came under the leadership of King Abdullah after the long period of rule by King Fahad. It became a way of highlighting achievements and gaining public support as change occurred. As power shifted to the reign of King Salman in 2015, other initiatives

become dominant and were utilized in the creation of image. With this change of goals, support for planned long term projects by former Kings are sometimes side-lined and are neglected. Something that could be happening with KAEC as not enough time has passed to judge recent changes in government.

Both participant 5 (FGP5) and participant 6 (FGP6) later agreed with many of the findings discussed above and also highlighted two additional points; the first was the complicated relationship with EEC, the private development partner of the project and their lack of cooperation and sometimes communication with the government entities responsible for the supervision of the project. The second was the uncertainties facing the project as new government policies are planned and implemented in lieu of King Salman's ascension to the throne and the subsequent changes in the countries governance. Both points coincide with the focus group discussion and validate their finding from the perspective of the government. In the end, as the findings have pointed out, it is primarily politics as opposed to economics that drives development in Saudi Arabia. It is through concepts like place branding that this is manifested and highlights its importance not only to development, but to politics in the region, in a way it is the propaganda of the modern era and links city branding to nation branding as mentioned by Björner (2014). As participant 3 (FGP3) states:

“Image carries power. Belief carries power, that means if used properly it has much value”.

(Focus Group, Academic/Professional, Character Position: 32228-32316)

9.5 Implications on the Conceptual Framework

The conceptual framework developed in chapter 4 perceived place branding in new cities as an actor driven process that links physical form and the symbolic meanings of place over time. It built this conceptualisation based on the differing degrees of power held by both direct and indirect actors involved in the process of creating new urban form. What the findings have shown is that new cities have the ability to evolve independently of planned development through brand identity and to take on the human attributes of life to become actors in their own right. Furthermore, the findings have provided insights on what is happening in the context of Saudi Arabia's new cities and has shed light on what

needs to be done to improve the understanding of the place branding process. While the conceptual framework was able to provide a base to explore these issues, it highlighted three main stages of the branding process in new cities. These are drivers, implementation, both physical and conceptual, and finally actors. When initially conceived, the conceptual framework was based on the literature that considered globalization as the main driver for the creation of new cities. While the research has validated this assertion, the issue wasn't found to be as straightforward in the developing world. In the case of Saudi Arabia, politics was shown to be the driving force in the development process resulting in the involvement of a complex range of key actors and goals. Therefore, any study of place branding is directly linked to the study of development and local politics, and the main actors driving them.

From an implementation perspective, the relationship between city development and the creation of an accompanying brand identity has been shown to be reciprocal as opposed to the mainly linear relationship that exists in established cities as the majority of urban form is already in place. This is not to negate the fact that all place branding exercises are in a constant state of flux, but highlights the more complex reciprocal relationship that exists in new city development. In new developments, concepts of identity have been shown to affect physical development. Success can only be achieved by balancing different goals in the process to reach authenticity, something Saudi Arabia has failed to do in this context because of the conflicting goals of its new city development process. The research has shown that the relationship between the three brand identity components, place development, the connected message, and the place experience that result in place image, must continuously interact and evolve to create authenticity and subsequently successful urban form that fulfils economic, social, and political goals. Finally, as initially emphasised in the original conceptualisation, because of the rapid nature of new city development, this process must constantly be reviewed and adjusted over time. But as discussed in section 4.4, this temporal aspect also affects all drivers and actors that are involved in the process as they are in a constant state of change. But for this study focus was specifically placed on how the conglomeration of these complex parts directly related to the process of place branding. To reflect these insights, the conceptual framework developed in chapter 4 was adjusted in the following figure:

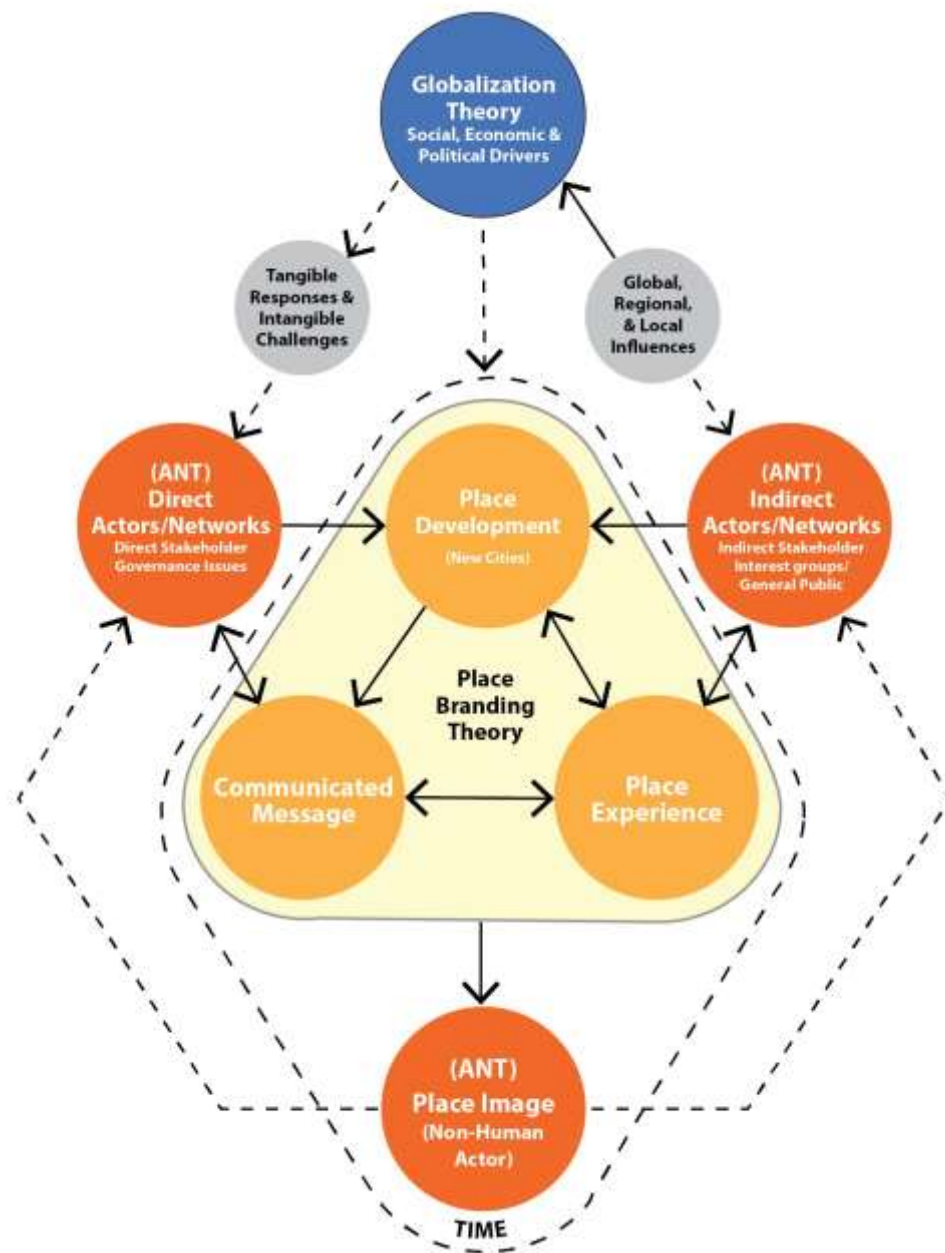


Figure 9-1 Adjusted conceptual framework

9.6 Conclusion

The findings have highlighted the importance of place branding in new cities and that the development and branding of new cities is extremely interconnected and actor driven. It also places focus on the challenges involved in place branding such as politics, special interest groups, management, stakeholder involvement, and authenticity. To properly develop and brand a new city, effort must be placed on aligning the development with all place branding goals. While economic and sales goals are important, they are not enough

in this context. The focus on people must come first making social development equally as important as physical development in new cities and their branding. Place branding therefore is not separate from the development process as a strong reciprocal relationship exists between them. Finally understanding the complex association between a name, a concept and a place is imperative in the creation of a place brand in new cities.

Chapter 10 Conclusions

10.1 Introduction

The following chapter looks at how the research addressed the aim and objectives put forth in its initial conception of the study. It then goes on to explore how key findings identified in chapter 9 contribute to new knowledge on both a theoretical and practical level. Subsequently it reflects on the methodology by highlighting the strengths and weaknesses of the study. Finally, the chapter concludes with recommendations for future research and provides a concluding note on the overall process.

10.2 Addressing Research Aim and Objectives

This study set out to explore the development of place branding strategies for newly planned cities that are without an existing urban fabric or population, a gap that was identified in the existing literature. To meet this goal, focus was placed on a specific country in the developing world and a specific governance structure, namely Saudi Arabia and its developmental monarchy. The overall aim of the study was to identify and assess critical place branding elements that create a competitive place brand for new cities in the country from economic, political, and socio-cultural perspectives. This was accomplished by answering a series of interconnected research questions that specifically target each facet of the branding process as follows:

1. What is the relationship between the development of new cities and place branding theory?
2. How does this relationship manifest in Saudi Arabia's new city initiatives?
3. What are the critical elements that must be taken into account during the process of branding new cities in Saudi Arabia?
4. How do different actors influence the development of place branding in this context?
5. How do we address the temporal dimension of branding in new cities?
6. What role do concepts and ideas play in the process of branding new cities in Saudi Arabia?

To answer these questions and in line with objective 1 of the study outlined in section 1.2, a conceptual framework and a research methodology were developed in chapters 4 and 5 to study the branding of new cities based on a review of place branding literature outlined in chapter 2. This also involved an in-depth exploration of Saudi Arabia's development process and its governance structure, including its attempts at smaller scale new town development in Yanbu and Jubail and its overall place branding efforts described in chapter 3. The challenge was to extract and link viable concepts that were applicable to places with no built form or population. As most of the literature focused on the branding of existing places from multiple perspectives this became a complex task as assumptions had to be made on what constituted place branding in this context. Further effort needed to be made to identify elements that were specific to the developing world, the primary location that these new cities were being planned and constructed. But each country was different and had its own national and regional characteristics. The resulting conceptualization therefore tried to balance national, regional, and global factors instead of being specific to one country or area.

From another perspective, the importance of actors in the developing world was repeatedly highlighted in the literature, linking actor driven 'Agency' development models to what is happening in this part of the world. This model was found to cross over into place branding literature as the development of new cities was identified as being strongly actor driven. The need of a common denominator between globalization, development, and place branding led to the identification of actor-network theory (ANT) as an appropriate lens to explore place branding in this context and over the different time periods of the process and achieving a main objective of the research which was to develop a conceptual framework to analyse place branding in the context of new cities. This framework was then used to address the second objective by developing a methodology to identify key indicators of place branding in new cities in Saudi Arabia using a case study approach and four other data collection methods and analysis. These were the identification of city representations and their analysis, public and social media analysis, ANT analysis, and finally semi-structured interviews and their analysis. Multiple sources of data were also used to triangulate the findings and strengthen the overall validity of the research. The application of this methodology was then used on the KAEC case study to assess the relevance of the resulting elements on identified target audiences and resulted in the two analysis chapters (7 and 8) and the findings chapter 9.

This chapter also included the testing process and the resulting refinement of the conceptual framework developed in chapter 4. The final objective of this research was to identify more generic implications of place branding on a global level which will be outlined later in this chapter. The following section will further elaborate on how the study answered the research questions and provided a contribution to theory and practice.

10.3 Reflections on Key Findings

While exploring the critical factors involved in branding new cities, the findings chapter highlighted the role of actors and local politics in the place branding process, issues that were found to be prevalent in the developing world. The Saudi Arabian case study and the rapid changes happening in the country underscored the importance of understanding the drivers behind the phenomenon. Due to the monarchical governance structure of the country, politics becomes a sensitive topic in public and participants of the study were found to be hesitant to discuss such matters openly or in detail. That said many alluded to issues of poor planning, weak implementation, and the involvement of special interest groups that have plagued the KAEC project. However, EEC, the project's private developer and government partner has maintained an unrealistically positive outlook in light of the bailout and weak performance of various city elements of the project over a span of ten years. This conflicting message is directly related to the authenticity of KAEC as a brand, weakening it from a public perspective. This has further cast doubts on the existence of an applied system of transparency and accountability when it comes to large scale developments in the country. The study was initially conceived to explore the branding of new cities during their early stages of development with the hope of understanding how a place brand is articulated through a concept in lieu of any built form. While this has been extensively explored in the study, focus has been somewhat shifted to encompass drivers of city inception and the multiplicity of actors and goals involved in the project's planning and implementation.

While the findings were quite clear, they were hard to validate due to the top-down nature of the government and local sensitivity in discussing topics that relate to politics in the country. That said, on the 25th of April 2016, during the final write-up of this thesis, higher levels of the Saudi Arabian government under King Salman have announced a new vision for the country to be implemented by 2030. The goal of this new development plan

was to restructure Saudi Arabia to be a more competitive and modern society. Although the plan covers all aspects of society, what is of note here is a specific section under economy titled ‘Rehabilitating Economic Cities’ that states “We are aware that the economic cities of the last decade did not realize their potential. Work has halted in several cities, and others face challenges that threaten their viability”. Additionally, new leadership has started to restructure the management of these developments and salvage their positive components (SAG, 2016:50). The report also mentions issues such as the need for increased cooperation between the public and private sector, the inclusion of the public, transparency, and accountability, all factors that have been found to affect the development and branding of new cities in the country. This further shows that there is a serious implementation challenge regarding the new-city concept in Saudi Arabia and validates many of the assertions made in this study.

While the announcement was a positive step in the overall development of the country, it needed to come from higher levels of government as opposed to the actual entities responsible for implementation and oversight, which shows insight on some of the main governance issues facing the country and the differences across different tiers of the system. Surprisingly, the study has echoed many of the overall challenges facing Saudi Arabia by just exploring one facet of the country’s development initiatives, mainly new cities and PPP partnerships. That said, it also highlighted many of the challenges of branding of new cities in Saudi Arabia as well as possible ramifications on the rest of the developing world through identifying a framework that encompasses critical place branding elements that should be taken into account in the development of new cities.

10.4 Contribution to Knowledge

While the research did not aim to develop a new place branding theory, its exploratory and inductive nature furthers the field of study by focusing on the challenges of branding new cities in the specific context of Saudi Arabia as well as various generalized themes that are applicable to similar endeavours in other parts of the developing world. It also contributes insights on the use of ANT as a theoretical lens to explore place branding in the context of new urban form. Additionally, the research has made contributions in various areas of knowledge that relate to place branding on both theoretical and practical levels as will be discussed in the following sections.

10.4.1 Theoretical Contributions

One of the clear contributions to theory is the **strong distinction between place marketing and place branding**. While this is highlighted in the literature, its application is still limited in practice as focus, for varying reasons, shifts to the marketing of specific urban projects with the misconception that their success will be positively reflected in the overall brand of the city. This is highlighted further in the unique case of developing a new city as there is little to support these projects from a holistic level as no city yet exists, transforming any urban project into a speculative investment that is void of any context. Therefore, the research has highlighted **the limitation of place marketing to provide place branding results, and the negative consequences of their inappropriate use**.

The research has also attempted to link various distinct areas of knowledge through a conceptual framework that was designed specifically to study critical factors involved in the place branding of new cities in Saudi Arabia. As the process of creating a place brand in this context involves a limited number of major actors, issues of power, and specific socially constructed semiotic meanings, ANT was useful in explaining how and why entities struggle to brand new urban form. The theory's use further reflects the perception that place branding is based on a network of associations discussed in chapter 3, something that has come out of the findings and strengthens **the need to explore place branding in new city development through the interplay between semiotic meanings that are constantly developing and changing**. ANT further allowed the research to shift focus from powerful human actors who drive the development of the brand to study the impact of the concept of city as an active participant in the development process. Linking the drivers behind the development of new cities and their branding through both human actors and concepts provided insights on how a place brand is created and changes over time. Furthermore, it has shown that **in absence of built form, the concept of place brand can influence behavior and ultimately affect the success or failure of a new city**. But the study has gone even further to suggest that **in the specific context of new cities, place branding becomes a prerequisite in the development of physical form**. Additionally, place branding concepts have been shown to drive sentiment on both a local and global level highlighting their importance as agents of change and an important type of soft power. What this means from a theoretical perspective is that **place branding becomes just as important than the new city development and can embody it with**

the power to enact change in the physical and social fabric that is eventually produced. As this is possibly the first time ANT has been used to examine the place development and branding of new cities, the insights mentioned above and the conceptualization developed in this research were two of the main contributions to knowledge that have resulted from this study.

From a development perspective, the study highlighted the motivations behind the inception of new cities in Saudi Arabia, specifically the political and financial factors that are involved. What this means is that **theories on globalization and competition alone do not drive new city development in the context of the Middle East** and possible other places in the developing world mentioned in chapter 9. As branding can be seen as managing competitive identity, effort must be employed to redefine place branding in this specific context to reflect other drivers and goals. But will the resulting definitions and theories be considered place branding if they go against global consumer and competition based branding of place? Areas such as the Middle East have always struggled to balance their specific cultural, social, religious, and political structures with globalization (chapter 2). But what constitutes right and wrong? From an academic perspective, differing goals and objectives need to be studied and understood in the pursuit of knowledge. There is no doubt that **place branding is being used in places like Saudi Arabia and other countries in the developing world, but it follows its own rules that sometimes conflict with western structures and theories.** This study has taken a small step in exploring these differences from the specific perspective of new city development and branding.

From a micro perspective, while additional research needs to be conducted in different contexts to develop specific theories relating the branding of new cities, various critical elements have been identified in the research on Saudi Arabia that could contribute to knowledge on the topic and can possibly be generalized to other city development projects worldwide. Primarily, **the relationship between development and new city branding has been found to be strongly actor driven and reciprocal in nature** mirroring the finding on the use of ANT in the branding of new cities. While this doesn't make place branding any less complex than in existing cities, **it highlights a different type of complexity that is unique in nature and follows different critical elements.** As urban form is being developed in tandem with place branding messages, **the value of its use becomes paramount**, not only to the success of the project as a city but

even its very existence. The literature is rife with examples of failed new cities around the world. As mentioned earlier in this chapter, recent announcements by the Saudi Arabian government have cast doubt on the success of their new city development program. This is not to say that place branding alone was responsible for the success or failure of the new Saudi Arabian cities, it just highlights **the importance of its use in the development process from the initial vision stage, throughout the complete development process, to its final operation as a working and vibrant city.** It is the unique characteristic of new city development that makes the branding of new cities so interesting. **As there is limited or no urban form or social fabric at their inception, the concepts being developed to represent these projects become more important than the actual physical form being developed.** Furthermore, it has been found that these concepts have to reflect the planned social development of these cities as well as their planned physical form. This differs from the literature as place branding concepts are perceived as actors in their own right that are able to enact change physical and semiotic change. It is this planned urban and social development that makes new cities very different than other types of place branding. This makes **achieving authenticity by linking planning, branding, and action a key critical element in the branding of new cities** and one of the cornerstones of its success.

10.4.2 Practical Contributions

While one of the initial objectives of the research was explain the weak performance of Saudi Arabia's new city initiatives, this has been overshadowed by the realization that there is no simple fix for the issues that plague the country's projects and research should first explore their development, implementation, and branding on a macro level from a theoretical perspective. That said, using KAEC as a case study has highlighted elements on the organizational and planning level as well as on the specific micro-level development and branding issues that could be useful in rehabilitating the project and others in the context of Saudi Arabia. First and foremost, efforts must be made to address the theoretical issues mentioned in the previous section, many of which can be generalized to other contexts in the developing world. **Place branding needs to be used in tandem with development during all phases of the project.** The goal is to reach an authentic message that reflects the needs of all end users, not just from an economic standpoint. This can be accomplished by **including multiple stakeholders in the**

development and branding process, especially **more cooperation with and between government entities** in the country. The KAEC project's weakness stems from weak implementation of the PPP agreement that established the project and needs to be restructured to optimize the value of the relationship. That said, EEC's need to focus on sales is understood but has greatly affected authenticity as they are negatively perceived as being financially driven as opposed to people driven. Therefore, it is recommended that **the communication of message is publicly controlled**, something that is imperative to the success of projects such as KAEC. From another perspective, the project must shy away from associations with themes such as 'economic' that focus on one core element instead of **developing a comprehensive identity that targets end-user residents**. Furthermore, this **place identity must be anchored in culture** to link place brands to local stakeholders. Finally, the project needs to utilize word-of mouth and **new mediums of communication** in their place branding strategies such as social media.

10.5 Reflections on the research methodology

Despite this study's contribution to theory and practice, various strengths and limitations have been identified that merit further discussion. The insights gleaned from the analysis and findings have validated the use of the exploratory and inductive case study approach selected for this research. That said, the unique context of Saudi Arabia from a socio-cultural, governance, and economic perspective limits the generalisability of the results. From a methodological perspective, the use of a single case study, though representational and therefore acceptable according to theory, limits comparisons. As only KAEC was in a stage of development that could be studied, it was deemed sufficient to explore place branding in new cities within the country. While data collection was organized in a professional manner and assurances on confidentiality were given by the researcher, various participants, especially those working with government or in the project were not comfortable being recorded limiting the ability to transcribe these interviews and instead the researcher had to rely on notes taken during and after the meeting. While in such situations bias is unavoidable; the researcher was aware of the possibility and attempted to be objective and report a participant's comments clearly and honestly. The possibility of bias was also noted in the coding process of the transcripts and during the thematic analysis. The researcher was aware of his own background and tried to be objective by not focusing on one view point or on any preconceived notions of what drove the process.

Another limitation of the study was the small number of images selected for the representation analysis. As they were selected by the researcher from a pool that was collected during the initial phases of the research, their selection was purposefully done and could have been influenced by the researchers own background and opinions. This was unavoidable and effort was placed to be objective and choose images that were representative of the image pool for each study period.

From an ANT perspective, the actors involved in KAEC's branding network were selected based on interviews conducted during the pilot study. While every effort was placed to represent all actors in the network, this process needed to be simplified to make the analysis achievable allowing for the possibility that something was missed. That said, in the top-down nature of the project's governance structure, human actors were quite clear and every attempt to represent other influencing factors were taken into account. Despite these limitations, the methodology was deemed to support the study's findings in an objective manner that addressed the three major components used for the evaluation of social research; reliability, replication, and validity.

10.6 Recommendations for Future Research

As the research was exploratory in nature and only focused on new cities being planned, built, and promoted in Saudi Arabian, the conceptual framework and findings should be further validated using multiple case studies in other new city developments in Saudi Arabia as well as in different international contexts with the goal of creating a viable theory on the branding of new cities. Once a stronger theoretical framework is in place, different aspects of the process can be explored further such as the governance of the process through PPP, its relationship to existing political and governance structures, the challenges of integrating place branding concepts and strategies in new city development processes, and finally the link between social development and branding in new cities in different socio-cultural situations. Additionally, more effort should be placed in exploring the motivations of developing and branding new cities in different political contexts and how this links to globalization and increased connectivity.

10.7 Closing Remarks

Looking back at my motivation behind this study in 2012, I feel that much has changed in my expectations of conducting in-depth research and my understanding of place branding. What stands out mostly in my mind was the unexpected complexity involved in the process of branding a new city and the diverse group of actors involved during the initial phases of development. I echo the thoughts of Socrates by saying the more I learned, the more I realized how little I actually knew. When I first started this journey, I was expecting to easily identify and solve a problem. To put in place a framework that can act as a roadmap for local governments and developers to assist in developing new city brands and their visual identities. How naïve and egotistic I must have seemed. I am now just starting to realize how much is involved in doing something that seems so straightforward. How many different facets are represented in creating an urban perception and why conducting such research is so important. With the skills and insights gained during the PhD process I hope to continue exploring the creation of new knowledge through both academia and practice as there is still much to be done on expanding place branding theory in the context of new cities as well as its ramifications in the Middle East.

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Appendix 1

PhD Research Information Sheet (Semi Structured Interviews)

You are being invited to take part in a research study. Before you decide whether or not to take part, it is important for you to understand why the research is being done and what it will involve. Please take time to read the following information carefully.

Place Branding in a Globalizing Middle East: New Cities in Saudi Arabia

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What is the purpose of the study?

This research is focused on understanding the dynamics of how government and private development partners use “place branding” to create a new image and identity to compete on a global scale and hopes to help future planners and developers in understanding the challenges of creating large scale urban projects. The study hopes to be able to help identify success factors that could encourage success and limit failure. This is important to Saudi Arabia as these cities have become a critical component in the diversification of the country’s economy and a solution to unemployment. Using King Abdullah Economic City (KAEC) as a case study, the research attempts to identify the critical elements of place branding in the context of new economic cities in Saudi Arabia to help these cities promote themselves in a competitive manner.

The field study will run until November 2014. Data will be collected and analysed from interviews with Government, developers, and other key community figures. Final results will be a PhD thesis and a summary report for participants. There is also the possibility that the finding will be published in a relevant journal.

Why have I been invited to participate?

You have been invited to participate because of your knowledge of one of the aspects of this research. You might be:

A member of the government or private Real Estate partner that are involved in the development and promotion of Saudi Arabia’s economic cities;

A professional member of the community that have had exposure to the promotional efforts of KAEC.

A potential investor or resident of KAEC.

Do I have to take part?

It is up to you to decide whether or not to take part, as participation is completely voluntary. If you do decide to be involved, you will already have this information sheet to keep and be asked to sign a consent form. If you decide to take part you are still free to withdraw at any time, and to withdraw any unprocessed data previously supplied without giving a reason.

What will happen if I take part?

You will be asked to take part in an interview, either in person, on the phone, or through Skype. The nature of the information is not anticipated to be of a sensitive nature. You will be asked about your experiences, perceptions and opinion related to the image and branding practices of KAEC. The interview will last approximately 30-45 minutes. If you give your consent, an audio of the interview will be recorded. Otherwise, authorised notes will be taken. The interviews will either take place at your place of work or at a public cafe. If conducted at your place of work, we kindly ask you to seek permission for the interview from your supervisors at your organisation if that is necessary.

What are the possible benefits of taking part?

I hope that the interview will give you an opportunity to reflect on what is happening in Saudi Arabia regarding the new economic cities being constructed and how they are being promoted, as they will eventually be important cities in Saudi Arabia.

What are the possible disadvantages and risks of taking part?

There are no potential risks for participants taking part in interviews.

Will what I say in this study be kept confidential?

All information collected about will be kept strictly confidential but anonymity cannot be completely guaranteed (as it is subject to legal limitations). Confidentiality, privacy and anonymity will be ensured in the collection, storage and publication of research material. Data generated by the study will be retained in accordance with the University's policy on Academic Integrity and kept securely in electronic form for a period of ten years after the completion of this research project.

What should I do if I want to take part?

You will be given 48 hours to read the participant information sheet and decide whether to take part in this research. If you would like to take part in this study after this period, please send a reply to 12054050@brookes.ac.uk

What will happen to the results of the research study?

The research will be submitted to Oxford Brookes University, and graded as part of a requirement for completion of a Doctor of Philosophy (PhD) degree. Interviewees may have access to a summarized version of the findings upon their request. Anonymity of participants will be ensured in the publication of research material in any form but as the sample size is small some implications for privacy/anonymity might occur. The data generated in the course of the research will be retained in accordance with the University's policy of Academic Integrity and must be kept securely in paper or electronic form for a period of ten years after the completion of a research project. Participants should be aware that there are legal limitations on data confidentiality and anonymity.

Who is organising and funding the research?

The research is being organised and undertaken by Turki Shoaib, a PhD research student in the department of Real Estate and Construction under Dr Ramin Keivani as the Director of Studies and Prof. Steven Ward as second supervisor, in the Faculty of Technology, Design and Environment, Oxford Brookes University, UK. It is funded by the Saudi Government as a part of their Higher Education Sponsorship Program.

Who has reviewed the study?

This research has been approved by the University Research Ethics Committee, Oxford Brookes University. If you have any concerns about the way in which the study has been conducted, you should contact the Chair of the University Research Ethics Committee on ethics@brookes.ac.uk.

Contact for Further Information

For further information, you can contact Turki Shoaib at 12054050@brookes.ac.uk

Thank you for taking time to read the information sheet.

Turki Shoaib
August 2014

Appendix 2

Dedoose Image Analysis Tables:

Image Analysis Descriptor x Code Count Table

	Affluence/Exclusivity	Authenticity	Economic and Social Progress	Global Outlook	History and Culture	National Pride	Quality of Life	Urban Development
Period: Initial Development	4	3	8	3	3	4	12	7
Period: Launch Period	6	3	9	1	1	4	9	12
Period: Redevelopment	3	3	8	3	2	1	12	4
Image ID: LP1	2	1	4			2	5	5
Image ID: LP2	2	1	2	1		1	2	4
Image ID: IDP3		1	3	2	1	1	4	1
Image ID: LP3	2	1	3		1	1	2	3
Image ID: IDP1	2	1	3	1	1	2	4	3
Image ID: IDP2	2	1	2		1	1	4	3
Image ID: RP1	2	1	2		1	1	5	2
Image ID: RP3		1	3	1	1		4	1
Image ID: RP2	1	1	3	2			3	1

Image Analysis Code Weight Statistics Table

	Image ID: IDP1 (frequency)	Image ID: IDP2 (frequency)	Image ID: IDP3 (frequency)	Period: Initial Development (frequency(weight))
Affluence/Exclusivity	2	2		4 (2.25)
Authenticity	1	1	1	3 (2)
Economic and Social Progress	3	2	3	8 (2.5)
Global Outlook	1		2	3 (2.33)
History and Culture	1	1	1	3 (2)
National Pride	2	1	1	4 (2.25)
Quality of Life	4	4	4	12 (2.42)
Urban Development	3	3	1	7 (2.86)

	Image ID: LP1 (frequency)	Image ID: LP2 (frequency)	Image ID: LP3 (frequency)	Period: Launch Period (frequency(weight))
Affluence/Exclusivity	2	2	2	6 (1)
Authenticity	1	1	1	3 (1.67)
Economic and Social Progress	4	2	3	9 (2.44)
Global Outlook		1		1 (2)

History and Culture			1	1 (1)
National Pride	2	1	1	4 (3)
Quality of Life	5	2	2	9 (1.78)
Urban Development	5	4	3	12 (2.67)

	Image ID: RP1 (frequency)	Image ID: RP2 (frequency)	Image ID: RP3 (frequency)	Period: Redevelopment (frequency/weight)
Affluence/Exclusivity	2	1		3 (2.67)
Authenticity	1	1	1	3 (1.67)
Economic and Social Progress	2	3	3	8 (2.25)
Global Outlook		2	1	3 (2.33)
History and Culture	1		1	2 (1.5)
National Pride	1			1 (1)
Quality of Life	5	3	4	12 (2.25)
Urban Development	2	1	1	4 (2.5)

Image Analysis Code Co-Occurrence Table

	Affluence/Exclusivity	Authenticity	Economic and Social Progress	Global Outlook	History and Culture	National Pride	Quality of Life	Urban Development
Affluence/Exclusivity			2	1			4	2
Authenticity								
Economic and Social Progress	2			5	1	2	15	10
Global Outlook	1		5			1	3	2
History and Culture			1			4	1	
National Pride			2	1	4			5
Quality of Life	4		15	3	1			11
Urban Development	2		10	2		5	11	

Sample Headline Analysis (2005 - 2006)

(Full table for the period from 2005 to 2015 is included on the CD)

Position	URL	Title	Themes
2005			
1	http://www.arabnews.com/node/277685	Abdullah Launches Mega Economic City Arab News	Government press release, vision, urban development, economic and social progress, quality of life, exclusivity/luxury, national pride
2	http://www.arabnews.com/node/278107	Ushering In a New Vision Arab News	vision, urban development, economic and social progress, quality of life, exclusivity/luxury, national pride
3	http://www.arabnews.com/node/278112	Turning the Economy Into a Global Powerhouse Arab News	vision, urban development, economic and social progress, quality of life, exclusivity/luxury, national pride
4	http://www.arabnews.com/node/278057	'Rabigh Development Will Benefit Jeddawis' Arab News	opinion/editorial, urban development, economic and social progress, quality of life
5	http://www.arabnews.com/node/277767	Work Begins on King Abdullah Economic City Arab News	vision, urban development, economic and social progress, quality of life, exclusivity/luxury, national pride
6	http://www.arabnews.com/node/277982	Be Part of Kingdom's Largest Private Sector Investment ...	vision, urban development, economic and social progress, quality of life, exclusivity/luxury, national pride
7	http://www.arabnews.com/node/277932	Do We Need a Business Angel Network to Enhance the ...	mention in other project or industry
2006			
1	http://www.arabnews.com/node/288479	King Visits Economic City Project Arab News	vision, country development, economic and social progress, quality of life, exclusivity/luxury, national pride
2	http://www.arabnews.com/node/290284	International Airport to Be Built in Rabigh Arab News	mention in other project or industry
3	http://www.arabnews.com/node/286458	Third Mega Economic City in Madinah Arab News	mention in other project or industry
4	http://www.arabnews.com/node/290438	EEC Expands KAEC Project Size Arab News	vision, urban development, economic and social progress, quality of life, exclusivity/luxury, national pride
5	http://www.arabnews.com/node/284791	Emaar Economic City Receives Saudi License to Float Shares	vision, urban development, economic and social progress, quality of life, exclusivity/luxury, national pride
6	http://www.arabnews.com/node/280815	Plans Under Way for SR10 Billion Makkah Economic City ...	mention in other project or industry
7	http://www.arabnews.com/node/288333	Emaar IPO Oversubscribed in 3 Days Arab News	vision, urban development, economic and social progress, quality of life, exclusivity/luxury, national pride
8	http://www.arabnews.com/node/291901	Promoting Knowledge Through Madinah Economic City ...	mention in other project or industry
9	http://www.arabnews.com/node/279201	Many Global Firms Likely to Attend EEC Meet Arab News	vision, urban development, economic and social progress, quality of life, exclusivity/luxury, national pride
10	http://www.arabnews.com/node/282171	Kingdom Embarks on New Mega Projects Arab News	vision, urban development, economic and social progress, quality of life, exclusivity/luxury, national pride
11	http://www.arabnews.com/node/288398	Record 9.2m Subscribe to Emaar IPO Arab News	economic and social progress, financial stability
12	http://www.arabnews.com/node/288181	Emaar Expects Huge Response for IPO Arab News	economic and social progress, financial stability
13	http://www.arabnews.com/node/288878	Emaar Gears Up to List Shares on Tadawul Arab News	economic and social progress, financial stability
14	http://www.arabnews.com/node/287827	Saudi IPO Summit 2006 Set Arab News	mention in other project or industry

15	http://www.arabnews.com/node/291940	Share Mania Again: Back Into the Frying Pan Arab News	opinion/editorial
16	http://www.arabnews.com/node/284517	Emaar Unveils SR42bn Jeddah Hills Project Arab News	mention in other project or industry
17	http://www.arabnews.com/node/283177	SAGIA Plans Economic City in Tabuk Arab News	mention in other project or industry
18	http://www.arabnews.com/node/286528	Editorial: Visionary Drive Arab News	opinion/editorial, vision
19	http://www.arabnews.com/node/280274	Governments Should Provide Leadership: Alabbar Arab ...	opinion/editorial, vision, leadership
20	http://www.arabnews.com/node/294610	KAUST Construction Set as Geotechnical Survey Ends ...	mention in other project or industry
21	http://www.arabnews.com/node/289724	Gates to Speak on ICT Role for Kingdom at Riyadh Forum ...	mention in other project or industry
22	http://www.arabnews.com/node/280126	Strictly Business: Emaar Properties Arab News	mention in other project or industry
23	http://www.arabnews.com/node/279419	SR600bn Worth of Projects Planned in the Kingdom Arab ...	mention in other project or industry, vision, national pride, economic and social development
24	http://www.arabnews.com/node/278754	Saudi Economy 'Poised for Another Good Year' Arab News	mention in other project or industry, vision, national pride, economic and social development
25	http://www.arabnews.com/node/280217	JEF Starting From Today to Feature Global Leaders Arab ...	mention in other project or industry, vision, national pride, economic and social development
26	http://www.arabnews.com/node/280167	Makkah Governor to Open JEF Tomorrow Arab News	mention in other project or industry, vision, national pride, economic and social development
27	http://www.arabnews.com/node/292409	Hail Silicon Valley to Create 600 Jobs for Women Arab News	mention in other project or industry
28	http://www.arabnews.com/node/292384	Forum on Smart Cities to Highlight Investment Opportunities ...	mention in other project or industry
29	http://www.arabnews.com/node/284329	KFUPM-Like University to Be Set Up in the Western Province	mention in other project or industry
30	http://www.arabnews.com/node/290112	Kindasa Announces Completion of Plant Expansion Arab ...	mention in other project or industry
31	http://www.arabnews.com/node/283470	Experts Ponder Sustainable Urban Development Arab News	opinion/editorial
32	http://www.arabnews.com/node/284421	Arroyo Seeks Saudi Investment Arab News	mention in other project or industry
33	http://www.arabnews.com/node/286559	'Kingdom's Boom Is Real and Sustainable' Arab News	opinion/editorial
34	http://www.arabnews.com/node/281345	SAGIA Reassures France Over Investment Arab News	opinion/editorial
35	http://www.arabnews.com/node/286108	Arroyo Makes Landmark Visit Arab News	mention in other project or industry
36	http://www.arabnews.com/node/280452	Dutch Envoy Explores Investment Opportunities Arab News	mention in other project or industry
37	http://www.arabnews.com/node/285232	Plastic Valley Planned at KAEC Arab News	vision, urban development, economic and social progress, quality of life, exclusivity/luxury, national pride

38	http://www.arabnews.com/node/287060	Stock Gains Land Brother in Hospital Arab News	mention in other project or industry
39	http://www.arabnews.com/node/283145	Sultan Affirms Look-East Policy Arab News	mention in other project or industry
40	http://www.arabnews.com/node/292600	New Budget Augurs Well for Tourism: Industry Expert Arab ...	mention in other project or industry
41	http://www.arabnews.com/node/285720	Emaar to Buy US Firm for \$1 Billion Arab News	mention in other project or industry
42	http://www.arabnews.com/node/283131	New Era in Saudi-Singapore Ties Arab News	mention in other project or industry
43	http://www.arabnews.com/node/281606	Saudi-Singapore Trade Ties Have Huge Potential: Goh ...	mention in other project or industry
44	http://www.arabnews.com/node/289940	Samsung Aiming to Become Regional Engineering Power ...	mention in other project or industry
45	http://www.arabnews.com/node/283869	Al-Dabbagh Receives Man of the Year Award Arab News	mention in other project or industry
46	http://www.arabnews.com/node/287008	Polysius Signs Deal With Al-Safwa to Supply Equipment for ...	mention in other project or industry
47	http://www.arabnews.com/node/285627	Yanbu, Where Breeze Is Blowing Arab News	mention in other project or industry

Appendix 3

Interview Transcripts

Interview 10 (ID10)

Professional, Businesses Man, international investor, Non-Saudi, Male

(impression of the city) We bought land in the industrial area of the city, when we went they toured us around the city, the first stop was the sales center with the huge masterplan and model, and when you see that, it's all oh my god, this will be amazing if it was built, having looked more seriously at the industrial area my impression of the city overall is that if there is an element of the city that was doing well, and can actually be called a success story it is the industrial valley element and the port, the other reason why I say it's a success is just if you look at the names of tenants and or owners who have bought land it is pretty much a list of who's who in the industry in Saudi, all of the big guys have either leased or bought land there. Infrastructure wise it is coming there as it will be one of the stops for the high-speed rail, my impression of the industrial element is that if there is a success it's that. My impression about everything else in the city is that they got great marketing materials, great collateral materials, the model the brochures and everything, but I don't see the growth in any of the other sectors yet there. It's a hugely ambitious project. (in comparison to Dubai) you go to the business bay's business center they have the same things, huge impressive model, but when you walk outside and you do the 360 in real time you've got dozens and dozens of buildings there. Some got hit by the crisis and they are still core and shell but a lot that are operational. Clearly you can't draw a parallel between business bay and something that is in the middle of the desert, if anything my personal assessment is that simply the location being 100 KM away from a major city may be what is preventing the pace or velocity of this thing taking off. It's not like someone that is happily settled in Jeddah is going to say I'm going to go live 100km north unless there are jobs and real opportunities there.

For example I asked the sales executive where he is living, he replied we have friends, people who have moved here and are living in KAEC, my wife and I have even thought about moving here but he said the reason why we have not is because of the kids schools, there are practical factors the lack of retail, lack of schooling, lack of things to do because it is so far, if it were ten or twenty KM from Jeddah maybe people would want to live there and it's only a ten minute drive into the city, vs an hour and fifteen. I don't know how in the long term it will do, I think if the industry continues the way it is, doing well, that could spur additional growth, additional uses, the arrival of the high-speed rail might be a game changer. The reason we bought land quite simply comes down to money, we paid a fraction of what we would pay in Jeddah, in Jeddah we would get non-services land, here we would get fully-serviced land, from a consumers perspective, commercial consumer, not residential, it's a no brainer, it's a great deal, (elements that help build the impression), part of it was personal relationships, the head of sales is a good friend of my colleague, old friend, so initially it was that, and it was him kind of telling my colleague on a personal level I think it's a great buy, then it was a site visit where we got the full marketing tour, saw the model, they took us to the next room, the auditorium basically, played the video, handed out the brochure, followed up by a drive, taking us to the industrial area, telling us about all the guys that are building and are up and running right now, all in all it was a pretty well conceived and delivered sales pitch. The tour was

followed up by a meeting in the office where another sales guy came in, and basically ran us through land prices here vs in Jeddah, it was a combination of various forms of media, plus a presentation of the business side of it, why an acquisition here makes sense, (outside the city what have you seen) we didn't talk to any other factory people, we haven't visited any of the booths outside the kingdom, I did visit an exhibition in Riyadh, some real estate show, so they had a presence there, other than that it was the website, good website, but it was really a matter of getting on the ground and going and seeing it, it wasn't like I was bombarded with other forms of marketing or media, they don't seem to promote the city at all, from my perspective, real estate 101, these are massive mega projects, tens of billions of dollars, you got to imagine that there are a lot of smart brains behind these kinds of things, but my sixth sense, what I learned when I first got into the industry was location, location, location, to me this is just that much further, not from an industrial perspective, from a residential, from an office perspective. I think its distance from anything else, might be a reason why some of its elements never take off, in this stage of development it would have more value if it was closer.

(there is no way something of this magnitude and scale could be messed up, then I found out that the government is completely not involved in the development process, at all, they are only in charge of the business side, the incentives, the regulations, and the processing, that's all they care about, they are not in charge of any development there, or what's being developed or who its being developed for at all, that's a big mistake in this scale of development, this partnership with government and private, for government not to be involved in this way means there is a lot of leeway for mistakes to happen, for problems to happen, additionally the structure, that KAEC has gone through emulates the country, it's very top down where everything is in the hands of these CEO's and the people on top, and their connections, I talked to the marketing department and there were four people in that meeting, all hired in the last year, except the top marketing guy that has been there since 2010, from the four people, only one of them knew exactly what I was talking about, a professional marketing guy, speaking the same language completely, the other three people had no clue what was going on. If I am talking to your management team for a city of that magnitude, and I am talking to four people, and only one person in the meeting know what he was doing, and all of them are brand new people, I am scared when I have to explain basic definitions)

(how realistic are the promotional materials?) knowing what I do about EMAAR's track record in Dubai, coupled with what I know about the demographic situation on the ground in Saudi, growth and population change for example, standing in front of the masterplan model, I don't see that happening in five years or eight years, maybe 15 or 20 years they will be there. It's a very long term project, if it sees the light of day as it is planned, I think it's every bit of 15-20 years, it's a generation project, the one challenge I do see from a residential perspective, an example is in Jeddah, another EMAAR project, when I lived here three years ago that project was facing financial difficulty, and that was due to price. They were priced out of the market, I think the mistake they made was to assume that the average Saudi can afford a unit like that which is far from reality, a mistake they have done with the BayLaSun project in KAEC. Who do you expect someone to buy at prices that are high end already in Jeddah when there is nothing there? Everything they should be developing in the next five years should have been subsidized, affordable and beautifully done that would encourage people to develop business and life there. Basically do what they did with the investment elements of the city. Give them an amazing deal. Perhaps the best way to sum it up would be that Dubai followed the model if you build it

they will come, it worked for them, perhaps the same people though the same thing would apply here but it just didn't work. The Dubai model is based on an open economy that doesn't yet exist in Saudi. Anyone in Dubai can come in and get residency and stay. There are major limitations on buying property in Saudi. (What are your thoughts on urban or city identity and its linkage to the people or modern international images of cities?). this is a debate I always have with my wife, she says it's all fake, and a lot of the critics of Dubai say it's all fake, my response is what is fake about good infrastructure, what is fake about real buildings? And what is fake about good services? Those are all real things, now it may not all come together to give you a strong sense of place and community, but Dubai by its nature is a very transient place, and I think that is more of a feature of the GCC because of the immigration regulations, you can never truly say this is home, I think a lot of people see all the glitz and the glamour and see that as fake but I don't understand what is fake in that? People compare it to Las Vegas. But what's fake about Vegas, it's a real place with its own unique identity. (The middle east defines its own identity in its own way and who is to say that it has to follow western norms. But in the same sense I can say that a city is designed for people and has to inclusive of everyone). I would say Dubai in that sense is a success story, if you look at Dubai marina, its full and alive, same with downtown, a thriving vibrant place, to the point of soul, I can go to other areas in the city and can really feel its history, pulse and vibe, it's a cosmopolitan place, it's an international city. The 2015 New Year celebration was a clear example of what Dubai is. They have built a unique identity. They have marketed themselves successfully from every perspective, business, residential, work, shopping, and tourism. They have put themselves on the map. Who are we to say that is wrong or right? By comparison, perhaps what KAEC did not do is plan for an all-inclusive vibrant society, if you look at the model it is all very high end, so perhaps they didn't plan let's have a mix of everything instead of a generic master plan. (When it comes down to why KAEC has done that in terms of a city development, I think that it's a reflection of Saudi, a country that is quite young and not used to including anybody, they got wowed by international designed masterplans and decided to do it, Saudi's problem isn't development, its implementation, they have great vision, and they have the money to put it together but because the decision making process is so top down, someone from the top puts out an idea and says get it done) and many times the guy at the top didn't get there because of their skills or intellect but his connections so he doesn't know what he is talking about, that's the problem (be even if they are, they put a great vision up, they have done appropriate planning, and have put into place programs with great initiative, the problem comes down to implementation.

Interview 11 (ID11)

Professional, Non-Saudi, Male

(Impressions of the city) The city is totally deserted, from one visit to another I don't see much development, the only thing that is really developed over there is the seaport, the concept of the seaport and train are brilliant and are big selling points for the city but I'm not sure about the city's brand, what are the facilities that are there? Who is investing in them? You have space in Saudi, the country is pretty much empty, when you talk to the people at the city they give you this story about how incredible this is, but under the surface it's not (why isn't it successful) EMAAR is struggling financially, they keep pumping money into developments that have not been planned properly, the selling point for the project isn't the city or facilities, it's the seaport, the railway and the industrial valley, these are existing elements that can help my business, not the city or the brand, (what built this impression?), site visits, news is all positive, press releases from EEC are

positive, no subjective articles, so far the city's image doesn't represent anything. The representations used for the city looks different than Saudi, but they are also encouraging a completely different economic structure that doesn't yet exist in Saudi such as FDI. Culturally, socially economically it is different to what exists in Saudi. In the end of the day it's an economic city and doesn't aim to be a cultural or residential place. it's called King Abdullah Economic City so I assume it's an economic project, even when you look at the plans for the city, while there is residential areas, the focus is on the economic elements such as business and industry. The residential areas come with these projects because people need to live somewhere, the city doesn't seem to be inclusive or open to the public, is even hard to visit without an invitation. The perception I have it that it is a gated community with economic goals and not a city. I don't see it going in the direction of a complete city but as an economic and industrial area similar to Yanbu but fancier, there is little chances that that will change in the short run. There is amazing potential there but it is unclear where that is going. The real potential comes from a solid rigid plan and structure and developing your plan to encompass everything. The city has made the mistake of utilizing foreign consultants without adapting what they are saying to the local context. Without including everyone in society this will not work. In terms of urban development in the city, why is unique? you can't do this as a one man show or a three-man show, everyone needs to understand, this is a huge project, involvement of everyone is key to doing this right and being successful. This involvement leads to better implementation that is a problem on a Saudi level not just the economic city. Decisions in the middle east are unusually done on the top levels and then cannot be properly implemented once it goes down to middle and lower levels as they are not involved in the planning process and don't understand what they are doing and why. Things have to change on a societal level for things to improve.

Interview 12 (ID12)

Academic, design consultant, Saudi, Male

(opinion about the city and how do you feel it compares to other city projects in the region) it was clearly established through the support of the government not just a private endeavor or something from the citizens themselves, through nature growth. Closer to places like Yanbu and Jubail which were based on a royal decree or government decision. These decisions should have involved the needs and wants of citizens in the country in how these cities will be used. It is clear that the population of the country is completely disconnected from the decision making process therefore the product itself, the new city doesn't take into account the needs of this population. The majority of people I know that have bought into the residential elements of the city do so for investment purposes and not for anything else. There is no intention to contribute socially nor economically to the city. With this mindset, I don't the city will have any future as a developed mature social fabric. That said, there will be some sort of social fabric developed there, but it is unclear what the social fabric will be and if it will be representative of all social classes. I really don't expect a smooth social maturity process in cities such as this as it is possible that different groups with different backgrounds will compete for social dominance that stems from their respective backgrounds. While I can't predict what the future holds for these cities, I do think their growth will be paired with social difficulties. The problem is that you will not have a successful city without including all the different groups represented in a functioning city, to target a certain level of society, to segregate migrant workers as the city has done isn't the correct way to go about it. Identifying and including all the stakeholders involved is going to be important. (what are the marketing/branding

elements that you have seen that has helped you build this impression/image of the city?) I haven't visited the city but it's basically been word-of-mouth, street advertisements for the products like villas or apartments, I have seen some of the images of the vision of the city through newspapers and social media but have big doubts on the possibility that that will be a reality, I feel that the city isn't connected in any way with the population, culture or traditions of Saudi Arabia, it's just an image they are trying to sell. I have doubts that the public was involved in any way, a good example is the golf course, give me a break, every golf course that has been built in Saudi has failed, how makes these ideas? The only one that is still sustainable is KAUST's golf course and that is because it is targeting a completely foreign community and is funded by the government to portray a specific western image to the world. Though we have all seen the massive development of places like Dubai, I think Saudi Arabia is very different than the rest of the GCC, its more controlled and conservative. And the same time you get bursts of political instability/rebellion every now and then, with the current situation in the country I don't think that these sort of projects will be sustainable in the long run. There are drastic changes happening in the social fabric of the country and the people developing these projects are counting on this shift. something that is definitely in my view intentional, (though this could be possible and there has been talk about the cities being incubators for change, but there seems to be little signs that this is being encouraged in the implementation of these projects), historically in the 70s people from the desert and tribes were encouraged to migrate to cities to build cracks in the existing solid urban societies. While this migration has occurred, the links to existing tribal areas is still very strong in the country, and has limited they ability to integrate into existing cities, a constraint that will not exist in new city development in Saudi. (in one way Saudi really wants to open up and merge into the global sociality, but there is such fear of letting go of power and control, because little by little, as you let people have more freedoms, you shift control to them, there are a lot of political issues there, but questions why these new cities are being developed in this way, why do we look at urban fabric without looking at social fabric, why do we focus on beautiful utopian images of cities without addressing how they will function for the people living in them, or why people aren't even included in the development process?), you need to realize that the majority of these sort of cities are gated communities such as Yanbu, Jubail or KAUST. While some are semi-gated or even socially gated where there is a sense of exclusion for the working class. This exclusion resembles a feeling that these areas or government areas akin to military. Its' not a physically separate place but you get the feeling that it is. It feels different and frankly speaking it feels foreign as more and more people accept homes or urban environments that are less in line with their cultural values and traditions. But on the other hand these newly developed projects almost seem "Disney-fied" but have the same social issues that are becoming prevalent in Saudi society such as connections to neighbors and immediate local community. But it is possible to overcome these negative aspects through designed spatial configurations that can work to merge people together. This kind of initiatives will make these places be perceived as being more livable. Especially on the smaller scale such as urban or community gardens, community activity rooms, something that is designed as opposed to what used to develop naturally in a mature city. (But the question in projects like KAEC is, there is no population and very little urban form so how do you develop these kinds of constructs? How do you build identity for such a city?) I think that defining it as a city at this stage is incorrect. Currently I don't think you feel that this is a city, what is needed is a hierarchy of social space that starts with the house/cluster and connects into larger social areas such as the fountain area in the downtown Dubai project. As the growth of these cities is economic or work based, it might be possible to build

these constructs from a work network instead of a residential one. (Another way of going about it is to focus on building more anchor elements such as universities, institutes, non-profits, specialized hospitals, or entertainment in essence building a community and life through things other than the economic focus. Give space to these entities to start attracting people and kick-starting life. As right now, the only reason people want to go there is to work in the factories. These clusters can't just be economic, there has to be layers, right now, the city's problem is that the focus is perceived to be completely economic and elitist and that there is no plan for anybody else, while there are affordable elements to the city, sadly they have started with higher end units instead of a mix of both. What is more surprising is the lack of link to society). (how are the main actors in the development of KAEC). It has nothing to do with Saudi. I truly feel that a group of "experts" mainly international, as well as a group of local consultants. (how can they do better/recommendations), in regard to executing these projects on the ground, local developers might have something to do with the development of sectors of the city, like ARAMCO for example, basically using external developers, to speed up the development process. It is important to think about the social fabric of the city. You need to plant the seeds to mold this population and will be a major factor in the development of the city and its image and builds identity. In the end it all comes down to people and if you don't include people you have a huge issue. The least you can do is create the seeds of social structures. This has to be tailored to the common denominator among the population in terms of social background. It can't be exclusive or elitist, it has to be for everyone, from the workers in the factories all the way to the CEO of the city. The larger the diversity, the smaller the common denominator, you can at least develop these smaller denominators and let them grow and develop naturally.

Interview 13 (ID13)

Academic, design consultant, contractor, Saudi, Male

The city was first marketing through the government as the future of Saudi and I think the sentiment behind the project from top government/the king was really sincere. They wanted to do something for the country, and it was a good idea with a track record of use in other countries. But there was a strategic mistake that was made in attracting FDI/investment, and one that have yet to be corrected. It was implemented in a haphazard way. By opening up the market to smaller investment and issuing labor visas caused a large influx of migrant labor, mainly through SAGIA. Focus should have been placed on attracting large corporations that would eventually provide jobs in the Saudi market. The relationship between social justice and political and economic decisions was wasn't properly addressed in the development of KAEC. The initial IPO of EEC and other major offerings were associated with large levels of corruption, this has led to large differences between what a company is worth in the market and its actual worth, Additional land deals to expand the city and contracts to provide services at higher than market costs were also under question. These issues that have led to the eventual bankruptcy of the project and the subsequent bailout by the government. There was no questioning, no auditing, no accountability, this is a public company. There should be regulations in place to address these issues. There should be transparency to stockholders. Has any of the projects of KAEC been successful? And the reason is that the project is based on personal interests as there is no system in place to control what happens. More so this has become the natural state of the project. The developing new cities is a noble idea. But in the shadow of the political, economic and financial system that is prevalent in the country, there are serious doubts that they will be successful. This eventually should be gauged on number of jobs

created vs investment made. As a result of this the project focused on the middle upper class that could buy units in city projects such as land, apartments, and villas. But as the project was stalled, people lost trust in the city and any chance of their units to be handed over. As there was no existing city, most were looking to speculate on the success of the city but found their investments failing as opposed to other opportunities. But regarding the branding and marketing, they have done a good job when it comes to city real estate products, which have allowed them to attract the middle class and make them believe in the project. This is because the middle class has trust in the government. But under the promises and the optimistic image the EEC projects, they know there is a major problem. (where does Saudi culture fit in to these cities?) There has been a philosophical explosion lately on the issue of culture on a global level. Here for example we have a dominant culture, which is the western culture, which has been steadily increasing. If you look at the new generation of Saudi's, if you ask them, about their impressions of Dubai western trend, it is predominantly positive. Even things like the study of the Arabic language in schools has become something secondary as people shift towards a more globalized world. from a political perspective you are encouraging this generation to be cut off from their culture and identity and this reflects directly on their understanding or connection to local urban form as they have no remaining links or association to history culture and traditions. (36min) these masterplans that have been developed for major Saudi projects such as KAEC and the kingdom tower project are all generic designs with no links to culture or local society. They have become tools to sell with little hope they will be completed as imagined. To do something different like encouraging social seeds in these projects will never be done unless you sell these ideas to the main decision makers. But it has to be communicated in a way that speaks their language. You could meet your economic and financial targets while at the same time do something unique and that will remain for generations to come. If this will honestly have been accepted and believed in you can propose these types of ideas. If this does not happen, all that remains are individual attempts that usually don't go anywhere as it is too complex and will in the short term affect cash flows. In the case of KAEC, based on the amount of money already spent, there will be something there, mainly industrial and economic elements, but nothing on the scale of what has been marketed.

Interview 14 (ID14)

Professional, businessman, contractor, Saudi Male

(impression of the city) First and foremost the master-planning of the city was not done properly. And the elements to attract interest in the city were also wrong. They didn't put into place elements that would encourage people to move there. If they put into place anchors such as a world-class hospital or a branch of a university, or something similar from the beginning. When they started selling the BayLaSun apartments they were priced at Jeddah levels, they started selling land, or were they focusing on foreign investment? you just don't understand what they were doing, it all seemed so confusing what they were doing and who they were, are they city developers or real estate developers or are they port managers? Another thing that I noticed was that majority of the major employees in the company were all real estate developers when I expected at least a mix. Thus just reinforced my impression that this was just a major real estate project with the good of sales and not to develop a city. Strategy isn't clear. Regulations on investment are clear, communication is weak. But they have to have a clear strategy. (how did you build this impression?) site visits, word of mouth, personal interest. The first real advertisement I saw was the seaside luxury BayLaSun project which surprised me as there

was nothing in the project, why would I want to live there? So the marking of the project was wrong. The normal layman would question why would he go there if there is nothing solid there. They need to build some reason for people to move there. The factories mainly employ labour from Asia so there would be limited jobs for Saudi's. let there be action there. Give a reason for people to go there, to move there. And not just any reason, it has to be a need. A strong reason for people to come. Everything they have done up to know is really basic. They need to focus on what really matters to people, they should learn from places like Qatar that put effort to anchor their country's by making agreements with major international hospitals and universities and opening branching in the country. I would go as far as build their building they require, furnish them, equip them, this expenditure is an investment in the city. (who are responsible for the project?) I don't know in detail but I think it's a mistake from the developers as they are the ones driving the project. But at the same time it's the government's job to make sure they are doing a good job. Other than the corruption in the project, I think there wasn't a clear link between vision and implementation. How do you spend billions without even understanding fundamental human needs? It was all done in Dubai style, all pictures and marketing, a friend of mine working for the city was defending the project and I asked him what do you think, you can bring be an advertisement of a pretty lady in sunglasses, all dressed up with her husband and kids, driving a yacht... I told him these people are not going to come and buy and live in an empty city, this is not your target customer.

Interview 15 (ID15)

Professional, businessman, real estate consultant, Non-Saudi, Male

(impression of the city) from a Saudi perspective it's the only project that has gained any visibility in recent years. the other planned cities announced in the north and south haven't shown any progress. Clearly the government is supporting KAEC to a high degree. Until know we still don't know the real propose of the project, initially I thought it was an industrial city, I didn't realize it was a full new city. Presently they seem to be trying to make the city succeed more than what was originally envisioned for the city. The original vision was providing a modern vibrant living environment for the growing Saudi population then they started focusing on the port and other industrial elements more. (how did you build this impression), a visit to the city, they have excellent media exposure, they are always in the newspapers, both articles about the city and advertisements for city projects like residential units and land as well as industrial land, they use billboards to advertise these projects on the streets of Jeddah, but regarding advertising for the city itself, I've not seen that. (how do you gauge the success or familiar of the city or the elements being sold). That they are constantly putting out real estate products in phases gives a good indication of success, also press releases from major companies that announce opening factories in the city is also a strong factor and gives a strong indication of the support they are receiving from the government to get so many local companies to show interest. From the perspective of word of mouth, I don't hear much, but it is predominantly negative, especially those that took the chance and bought property for investment are now looking to sell as there is no life there. (has their marketing built a realistic representation of the city?) to a certain point, especially the residential units they are selling, but not on the city scale in any way, there is even an initial public impression that it's all a way to sell land and residential units and that the city will never become a reality. But with more and more companies announcing investment people are starting to feel more positive about the city but that it will take a long time to happen. I remember seeing the master plan and model of the city, some images of towers, I felt that they

weren't very realistic and focus more on marketing, I think that as the industrial and port elements of the city become more complete, this will drive growth in the city. Similar to Dubai I think it is possible that as the city takes place, this modern city will be the identity of KAEC. Initially with Dubai, the impression I had was that this new massive development was alien to the area but with time it became the norm and something to inspire to. This cityscape of the future has become "the Dubai Style", and stands for anything new and well done. These new cities in Saudi will take a lot more time, but will leave its mark on the world that this is the new face of Saudi Arabia and will represent the identity of the country. (KAEC stakeholders) firstly government, the king's vision, Though I know of SAGIA involvement in the cities, I have a question mark when it comes to their influence. The perception is they want to scale back their initial strong drive for FDI. KAEC hasn't really focused on the government development bodies in Saudi and encouraged their involvement as other large projects have done. The developer EEC of course is important in this process. From a social perspective, the city can only be accessed by invitation, that leaves an impression of exclusivity and it being special. I don't feel that this exclusion is an issue as there is little there and no reason to visit unless you have a reason to. Everything linked to the social aspect of the city doesn't exist there yet. You go there now purely for business. There are not universities or hospitals, no unique shopping or recreation, there isn't anything there. It will take a long time for that to change. I really feel the goal of KAEC is business and will remain business. They could have linked the city to other industries such as religious tourism as an alternative gateway to the holy sites but that didn't happen. The perception I get from the development is that it will be more liberal and less conservative than other areas of the country. I feel that because the city will be modern and isn't linked to existing cities, the social culture will be different and more open. Additionally, there are no religious elements in their advertising, we are used to everything new as being more open. I do believe that more people should be involved in the development of these cities, universities especially should be involved and should have a presence there, it would add life to the city and speed up its growth. I feel that involvement should be more in terms of developing presence as the city is highly supported by the government, it's an opportunity to be first. (how can they improve their marketing), tours to different public organizations, universities, schools, businesses, they need to push including people, talking to people, it would be good to focus more on the marketing of the city instead of just their real estate products. I think the city started really strong in terms of initial identity but that wasn't maintained and the message changed. Just knowing that the King was periodically visiting the city was a strong factor. All people think it is right now is residential neighborhoods and land that are being sold. Initially I was excited about the city, but seeing the slow progress I have changed that impression. It might be possible 10 or 20 years in the future, just not anytime soon. From an investment perspective I wouldn't mind as there are some good deals there.

Interview 16 (ID16)

Academic, property owner, Saudi, Male

(impression about the city) I first heard about it about two years ago that they are building a new city and were working on the city's infrastructure. And this year I heard that it now has a hotel and some restaurants, and other elements such as villas, what I have heard from other people that it was being developed slowly. I haven't really visited the city but I hear about it from people that have visited it as it isn't included in and doesn't affect my interests. (how did you build this impression) word of mouth and newspapers, I've also

head some mention in it on the TV news. (stakeholders?) from what I understand is that the government is supervising the project and some private company is developing the city. I feel that the project is targeted to the industrial sector and ports and regular Saudi's have little to do with it. I don't feel that it will be a complete city anytime soon based on the slow speed of its development and this will take many years to change if the proper financing is available which is doubtful with the decline of oil revenues which will make the slow speed of development even slower. Even the high speed train they are developing for years is still far from being complete. (what do you think is the main reason for this slow development) the decline of oil revenues is the main reason but it's also because of improper selection of contractors as they focus on the lowest bids vs quality or experience as well as personal interests and relationships. This is also a reflection of government pressure to finish projects in the shortest amount of time without the proper understanding of the development process. This implementation problem is something that effects all projects in Saudi Arabia, not just KAEC or the railway. One of the main problem in Saudi is corruption. The only times projects have been completed on time is when a company with an excellent track record such as ARAMCO was selected to complete the project without a public bid or financial restrictions such as was done for KAUST and the Jeddah Sport City. But even in this case I heard stories of construction problems because of the short time given to complete these projects.

Interview 17 (ID17)

Professional, businessman, Saudi, Male

(impressions about the city) un to now it's been moving a very slow pace. Though they are putting a lot of effort on advertising and have started to do various social activities there. But there isn't any public services for the community except a private school that just opened. I hear a lot about people and their families moving to work in KAUST but not at KAEC. When I visited the project I saw a very impressive and large industrial area that adjacent to a new very large port. They will build a very large beach. But how are they targeting? The city is huge, even driving inside the project you sometimes can go for 20min without seeing anything. There are some small elements but the impression I got is that it was empty. I still don't think there is any social life there. It thinks it will take another 10-20 years because it will start to resemble a city. The train will be a gamechanger as that will allow faster access to the city and will link to the services in Jeddah. In the end you will gauge the city on the people living there and not the amount of office, factories and housing that are being built. The city keeps selling property, and announcing projects and signing contracts but it doesn't talk about the people as there are very few there. Even EMAAR's employees are bused in every day. If their employees don't want to live there, then why would other people? There is nothing to do there. Work isn't everything. I feel that our culture and traditions have little impact on the development of the project. People in our culture want to be close to their families, want to be close to other people. If these cities don't realize this then how will they grow? More than this, looking at the city you don't even feel you are in Saudi. It could be in Dubai. The main problem we face in Saudi is the religious conservative people how have a strong effect on the rules and regulations implemented in the country. But what I hear people saying is, because these cities are new and modern, they will be less conservative and will have an influence on Saudi society. (How have you built this impression?) from a visit I went on, I also hear about it from other people that are involved or interested in the project. I've also seen their advertising in the streets for their villas and apartments. Most of what I have seen of the city is based on real estate and sales, I see very little connection

to the country of Saudi or its environment and culture. Before a person thinks about a job they first think about are family oriented elements that relate to life such as schools, hospitals, shops, entertainment. Even the small KAUST university campus nearby has social life and its infrastructure. Regarding KAEC I think that if they were patient and pushed to see it succeed through trial and error, eventually they will reach a set of policies that will work. They can't give up. I don't have any problem that it will take a long time, if it eventually turns into a livable modern city, I feel that it could be an option. I and other need places like the city as the existing cities in Saudi can't take more people. But as the city is now, they have had a lot of problems, but by being persistent, they will reach their goal. What's important is that it does not because like other projects that are never finished.

Interview 18 (ID18)

Professional, Businessman, Saudi, Male

(impression of the city) I have very limited knowledge of the city. I've passed the city on the highway but have never gone in. but what I saw from the road was quite impressive, something I haven't seen before. (clearly what was seen was KAUST which is on the edge of the new city as there is actually little to see in the city at this time, which was explained to the participant). I thought that this was a part of the city and that the two projects were the same. I've heard about the university in the news mostly and because of the controversy of having a mixed western campus in Saudi. From what I understand KAEC is a government project with factories and a lot of opportunity for investment in real estate and jobs. I mainly hear about in occasionally in the news and in the papers. I have also seen the billboards in the streets. I feel that the project is something quite advanced and unique and there should be more of them. (how did you build this impression?) the advertising mainly for the real estate elements, their attendance at the exhibitions, stands at the malls, and newspapers. You hear talk of the project on a social level but it isn't very clear and the information is conflicting as people know very little about it. I don't think the project has put much effort in educating the public on what they are doing and what has been done in the city. What they are showing is mainly to sell villas and apartments which makes them look like a developer looking for profits and not a city project. There should be more focus on the city itself. More effort to get people to visit and see what is being done there.

Interview 19 (ID19)

Professional, Businessman, Real Estate, Saudi, Male

(impression of the project?) I have a very basic idea of the city. It's a phased project with multiple elements. The image I have is still unclear as they have not tried to publicly show what they are doing, but from what I have heard they are trying to do something different and unique but the image I go from them is very basic. I haven't visited the project myself though I did get an invitation to visit the project through a friend, while they were holding a social event at the city. In my view the idea of the city is excellent. They are developing a complete city. I've seen some of the pictures they have put out and they look amazing. This is something we lack here in Saudi. When I saw the pictures it really made me want to visit the project and see what they were doing myself. It felt like something from outside or cities or country. I think the project will provide change in the country as well as jobs and housing. (how have you built this impression) I really didn't know very much about the project initially but I met a manager at the project that invited me to visit and showed me pictures and plans. It was something that I didn't think existed in Saudi. After this I started to be more interested myself. I would talk about it with friends and family

who have visited. And they would keep asking me why I haven't visited it and that it is like being outside Saudi. I really didn't see any advertising for the city and feel that that is a negative regarding the city. I did notice some sales advertisements for the city but these were now geared towards promoting the city so they were useless. What I have seen didn't reflect the potential of the city and only focused on the sales aspect. If they went further by focusing on city elements and life there they would be able to encourage more people to believe in the project. Instead of being shown a project I was being asked to go by a house of a piece of land in a location that is far away without any services or reason to do so. So many people still don't realize the concept of the whole project. Even when I talk to friends about the project, they say it's far and there is nothing there, the same idea I had in the beginning. That it is not a good opportunity. My expectation now is that with time and development people will understand the project better and will want to move there.

Interview 20 (ID20)

Professional, businessman, Architect, Saudi, Male

(impression of the project) It's a complete economic city with business industrial and residential elements. I haven't visited it but I have heard a lot about it, which makes me want to visit it and see what's going on inside it. If the project will be realized as they have promoted it, it will be a great change in city life in the country. I always see the advertising that is being put out for the city as well as some of the events they are doing and am one of the people that feel there is a potential to do something there or buy something there. (how did you build this impression?) Advertising, in newspapers or on billboards in the streets, word of mouth and through people I know who are working there. All of the advertising I saw was sales related and nothing really focused on the project as a whole or like in the city. But I did learn about the social aspect from people working in the city and through word of mouth. I also learned about the business systems in place through people working there and not through the media. In terms of realistic representation of the city in the advertising, I feel that it was only marginally achieved. They are doing a lot there that nobody is aware of and could be communicated better. What I would like to see is more effort on introducing the general public to the city and what is being done there from a social media perspective and well as from a planning perspective that makes the city stand out from existing cities in Saudi. Maybe open up the city more to visits and do more activities there. We know the name of the city and we know they are doing sales but there is little we actually know about the city itself. They might have a strong international image of the project to investors but locally people know very little. The main reason I know a bit more about it is because I know people that work there and not because of their efforts.

Interview 21 (ID21)

Professional, businessman, Real Estate, former Government, Saudi, Male

(impression of the city) KAEC is one of a group of economic cities established by the late king Abdullah to be new cities to attract people by providing industrial, business, and financial centers. I first heard about the city when it was announced in the news. Later work started there I would see advertising from EMMAR and they were targeting investors so I visited the city. The city will have the biggest port in the Middle East when it is completed as well as a large industrial area, from another perspective they will also encourage business there. The city will be linked to Jeddah through the new high-speed rail. All of these are major success factors for the city. The project is very large and has a bright future. It started strong in the beginning they had some problems due to

investment numbers and implementation but later picked up pace again. If they follow their development places I see the project as being very successful in ten years. (how have you build this impression?) Real estate experience and interest in projects, I used to work at the Madinah Knowledge City, one of the economic cities that were announced in 2005 so we had a strong relationship with the Economic Cities Authority. I also built an impression of the city through site visits to KAEC and their marketing and advertising though this has been secondary to the existing knowledge I had through my work. From individual elements, I think that government press releases were my first source of information. Also press releases and advertising by the developer EMAAR for their sales projects. Though they have done consistent job, I feel that they could do more in communicating a stronger image of the project. They seem to be focused on their vision for two to three years instead of promoting the project as a mid to long term project and investment. more like 10-15 years to start to show its actual form. People don't have a realistic impression of the future of the project. The impression in the general public is that there are investment opportunities and sales but not the real value of the project. Maybe it is because the project stopped before and they people lost trust. They need to have a stronger image in the market than what they are showing right now. Right now the project is ok but it should be a lot stronger at this stage. Their focus is on people that are related to investment and development; they need to take this further to reach every level of society. Something that is not just linked to sales and real estate but focuses on the future of this city. The city becomes a dream and a there is a goal to go live there. Show entertainment, show education, show medical services, even if it's a long-term plan but start to show the future.

Interview 22 (ID22)

Professional, businessman, Saudi, Male

(impression of the project) the project has business towers and other elements such as residential, tourism, and industrial. I haven't visited it but I build my impression of it through the newspapers, their advertising in the streets and from the internet. Regarding the concept, I think it's a great idea that will serve the country and its future but the impression they are giving doesn't reflect the scale of the project. They seem to be focusing on sales like any real estate developer and not on developing a city. They should focus on educating people on what they are doing and linking that to society and life. Most of what people know is based on their effort to learn and is not based on any efforts places by EMMAR or the government to properly promote the project.

Interview 23 (ID23)

Professional, businessman, Saudi, Male

(impression of the project) I don't have complete information on the project, but in my view it was developed to attract FDI to Saudi and to help diversify the economy. I've visited the project multiple times. I feel that the project won't start to take shape before 5-6 years, factories are now starting to show, the port is starting to become operational, from a residential perspective they are selling different times of units in different income brackets and land. The hotel is quite impressive; I tend to know more about the investment aspect of the city more than others because it relates to my work. I feel that the investments that have been encouraged at KAEC were placed in Jeddah, it would have given larger value from an economic standpoint of the country. It just seems that the two cities are in competition for the same resources but the difference is KAEC will take a long time to be realized while it will happen much faster in Jeddah. If I wanted to buy a

house in KAEC it will be a second home not a main residence, but if the city becomes complete it will be a strong magnet to people looks to move and have a home. From the perspective of facilities, I feel that they are providing something exceptional that is not available in other existing cities. I do believe in the project and it must be supported to help the county develop. It is imperative for it to succeed because it holds the name of the King and is his legacy. From a marketing and advertising perspective, I think they have done a good job promoting the projects that are for sell. They have used billboards and newspaper advertising and send sms's so communication for the products is quite good but not on the level of the city. For example, the BayLaSun neighborhood isn't promoting the city but a sales project in the city. There is not education on what is the city to the public and has only focused on the economic element. Investors and people that are interested know what the city is and the efforts being places to make the city succeed but the regular public doesn't have this information or know much about the city and its future goals. The results of the city probably won't show for another, 10, 15, or even 20 years when the city is in truth a city call KAEC. In regard to building a realistic impression of the city, I think EMAAR has built an impression based on their short term goals, and this, as I mentioned earlier is opposed to building a realistic impression of the city as a whole. While the short-term goals have financially supported the city through the initial phases of development, it hasn't really supported the concept of the city at all. I think the city needs stronger government involvement. It was developed in the beginning with certain strategies and goals they have been lost to sales goals. These strategies and goals have to be reviewed and adjustment.

Interview 24 (ID24)

Professional, businessman, real estate, Saudi, Male

(impression of the project) I haven't visited it but I have a general impression of the city. I read about it in the newspaper and hear people talking about it both in my social circle and on the internet in forums and on social media. I feel the city has been developed to show a new face for Saudi that is similar to Dubai in attracting FDI. The city will have a strong industrial element and other mega projects, its mainly targeting investors from what I understand and will be complete regarding infrastructure and services. It's a very big project. As a concept the kingdom needs projects like this. In a way by building it further away from existing cities and started from nothing they have in a way segregated it from the existing urban and social problems facing other cities. I think it has a strong future especially from an investment perspective but it will take time. (how have you built this impression?) its first a strong personal interest so I read a lot about the economic cities initiative as well as the development in cities such as Dubai and Qatar. I also hear a lot about it in the newspapers and other mediums such as social media and forums. In my view this is mostly personal effort and the city itself hasn't really done their job properly when it comes to promoting the city. All I see is advertising promoting the sale of projects such as villas and apartments and targets investors more then anything else. Little has been done to promote to or educate regular people. Similar to Dubai the city isn't targeting locals, it is mainly looing to international investors. (does the marketing reflect a realistic impression of the city), not at all. Again they haven't done a good job when it comes to promoting the city.

Interview 25 (ID25)

Professional, businessman, Saudi, Male

(impression of the project) yes I have heard of it buy just by name but I really don't know where it is located and haven't visited it. Mainly I have heard about it in the news on TV

and in the newspapers as well as a bit online. I honestly lack interest in the project and this could have shaped my limited impression and knowledge of the city.

Interview 26 (ID26)

Professional, businessman, SAFOLA, Saudi, Male

(impression of the city) I have a general understanding of the project but nothing detailed. I heard about it, the project started strong then slowed down and now is back on track. It includes a few projects but they are being completed but nothing major yet. There is infrastructure in place. I've visited the project once with my company so it was investment based. From my perspective the project is an opportunity that is needed in this country, especially that is in close proximity to a city like Jeddah. These sort of projects will reduce the pressure on existing cities and their infrastructure as they have limited opportunity for growth. They are an opportunity to make to new cities, to solve and avoid problems in existing cities such as substandard infrastructure (how have you built this impression) I believe that KAEC haven't been efficient in educating the general public on the city but because of my work in Real Estate and my personal interest, I have been exposed to a lot of the projects that are being constructed. If I was something without this background or interest, I don't think I would have much of an idea about the city. They should place more effort on this education through various media and through innovative methods. Other elements include word of mouth from other industry specialists, people that have worked on the project and later left, or through companies that are investing there. There is a lot of information online in forums and social media about the city and this also helps build an impression. (does the marketing reflect a realistic impression of the city), in all honesty no. when the project first started I felt that the marketing was a lot stronger than what they are doing now, they used to focus on the city, its future and the vision of the project instead of just pure sales. As they are building a complete city. A company like EMAAR should be more than a development company and work to promote the concept of the city as a holistic level with long term not short term goals. There should be a strong separation between sales and city marketing. The development of the city is an ongoing process and this should be reflected in its marketing,

Interview 27 (ID27)

Government, Ministry of Urban and Rural Affairs, Saudi, Male

(impression of the city) I haven't visited the city but have seen it from the highway. What I know is that it has a university that is on the coast. There is a residential area for both students and staff, (this is KAUST in Thuwal and not KAEC near Rabigh, the city is the project with the port and the industrial area). (how have you built this impression) I've seen some billboards on the highway and in Jeddah that concerns sales and some lifestyle elements. I work for the municipality and have heard very little about the city as we haven't been involved in the project. There is little cooperation between government entities in Saudi.

Interview 28 (ID28)

Professional, HR, Saudi, Female

(Impression of the project) I've visited the city maybe twice or three times around 2010. It was quiet, not a lot of people. Mainly people living there were the ones working there. But it was nice to be there with the ocean and all. The show room was cool but there weren't a lot of things open in the city. Just a few restaurants and a minimarket so we were limited with what we could do and where we could go. It was kind of like a part of Saudi but outside Saudi in a way. Something different. (how have you built this

impression), the visits of course, I haven't really heard much about it otherwise, but once I was in a family gathering and they started talking about buying places there. They were saying that the prices were going down so they were encouraging others to go and invest there as it was an opportunity. Other were countering that the drop in prices was trying to encourage people to buy as the project was failing. It kind of confused me as I haven't heard much about the project in years, and now they are saying that it wasn't really working, I personally haven't seen much improvement. but I am not really interested so it doesn't really matter to me what is happening. But my interest shapes a lot of what I know about the city. Though I don't notice their advertisements I do see them as sponsors in a lot of places, (do their methods give a realistic immersion of the city?) I don't think hit really gives a good impression of what is really happening, it kind of just gives an impression of the weight of the name by association is good. I think that most people are a bit confused what the project is as it started from government but then it started to feel like a private real estate project. (how can they do better) just say more about it. They are not consistent in their message; they disappear then appear and say something then disappear again. I have no ideas what is really going on as a person living in Saudi.

Interview 29-30 (ID29-ID30)

Professional, entrepreneurs, interior design company, Non-Saudis, Female

I haven't been to the city as I am a bit busy and have little interest. I would like to go just to see what they are doing as I hear about it. I feel that when the project started people were a bit negative of the project but with the events they have been doing people have slowly started to believe in it and are more accepting. I think the main reasons people have been against it are the open mixed environment. People are also a bit negative of new things here in Saudi. The distance is also a factor. (elements?) twitter, friends (word of mouth), I notice when they do competitions are events there as I am interested in doing things that are different and like the social aspect of it. (are these competitions in KAUST or KAEC?) they are in KAUST but I am not sure, aren't they the same thing? (Other lady) I hear a lot about the master's programs and Phd programs there so I am interesting in knowing more. (pointing out the difference between the two, discussion about the confusion, both thought that KAUST is inside KAEC). They have to do something about this confusion. They need to be very clear on who they are and what they are doing exactly. I hear about it through friends but they don't put out clear information about what they are doing, what is there and what they have accomplished.

Interview 31 (ID31)

Academic, dean at KAU, Saudi, Female

(impression of the city) I have visited the city, I think it's nice, it's like you are not in Saudi, in a less conservative country but in Saudi. It's a gated city. I really haven't been following up on their progress so I only have a general idea about the city. (elements?) the initial advertising at the launch, as it is an educational institution and I am working in Academia at KAU I was interested and I get information and announcements about it and its goals and about collaboration (is this with KAEC) yes with KAEC, sorry I mean KAUST. (we are talking about KAEC, have you seen any of their advertising or marketing) I really don't recall see any. I've seen something about presentation using holograms on the news and how they presented it to the late king Abdullah. They were promoting KAEC as the place that has the top of the line technology and modern infrastructure. I also know that EMAAR is developing the city and they have a reputation as a professional developer from Dubai. (how can they improve) to make it personal and interesting to the general public. They need to focus on what interest's people. They need

to develop things in the city that people will find useful or interesting. Personally, I'm in education, so tell me about what is happening regarding education in the city, how can they be useful to me, how can we collaborate, if its only targeting economic goals, then this is another target, and they can focus on that. But they need to tailor their marketing to different segments of society so people feel that they are personally being targeting and have a stake in the city. To succeed they need to open it to the people. This interaction is imperative to survival and to the success of the city.

Interview 32 (ID32)

Professional, placement officer, Saudi, Female

(impression of the project) I have visited the city, I know that they sell land and residential units, it has a hotel and some restaurants, it's like a compound. I really think the project is amazing, it keeps moving forward in terms of development over the years. (how have you built this impression), social media, word of mouth from friends, they organized a trip for the UBT, the team responsible for the visit were very knowledgeable and the presentation was very professionally done. (does the marketing reflect the reality of the city?) to a certain extent, their focus is on sales more than anything else and not on the city specifically. They should increase their advertising on a city and social level, they are trying but they aren't reaching many people.

Interview 33 (ID33)

Professional, HR, Saudi, Female

(impression of the project) I was there two days ago. Just went to do something different at one of their weekend events. I think the project is awesome, a lot more people there than before. It's quite organized, quiet and clean. (elements), I think my impression was mainly from the visit in comparison to similar activities in Jeddah where facilities are badly used and there is no respect for other or the environment. In a way them limiting people coming into the city has maintained a certain standard. It's quiet and clear and you feel like you are in a civilized place that is safe. From another perspective the quality of finishing in the city seems a lot higher than in Jeddah. It's mainly the events that the city does that give me this impression. This is mainly promoted to a certain level of society on social media. (reflects reality), it doesn't think they do any specific targeted marketing for the city, it's just events. Most of their marketing revolves around sales. I would recommend more activities and services to attract more people.

Interview 34 (ID34)

Academic, Saudi, Female

I've never been there. I do believe my impressions of the city has changed over time. Initially I thought it would be a great experience but some people I know visited and they weren't impressed so that affected my view. There was nothing there to do. It was like a big real estate project where they are selling property. It's also a long trip as its very far from Jeddah. Basically there wasn't anything special to make it stand out. (elements), word of mouth mostly. I haven't noticed much advertising of the city; the only good thing is that it is accessible though by invitation. Places like KAUST isn't accessible at all unless you know someone inside and are invited to come. (does it reflect reality), I've really never seen any real advertisements, I really have no idea what is happening there though I am interested in knowing more. They might try to focus on social media as that is one of the main platforms people use nowadays. Maybe involve groups from Jeddah more such as special trips like they do at KAUST.

Interview 35 (ID35)**Professional, businesswoman, Saudi, Female**

I've visited the city and stayed there for two days. I first heard about the project I felt that it had great potential and wished I could afford to buy a house or an apartment there. Even as recently as last year I still have excited to buy there. Now that the project is more developed my opinion has changed. I during my recent visit and seeing the situation there I have stopped. Why? Because the services and maintenance are weak. I have asked around and people that have bought there are not happy. This has stopped me though I think the location is perfect for me and I like the quiet aspect of the city and I like the sea and the price was encouraging. My main issue was I felt that the city developer was really slow, we are in the tenth year of the project but it feels like it's the first year based on the work that I can see there. I'm not sure if it's government regulations that is limiting the development, or its some internal problem, I really don't know. (How have you built this impression) meeting people that have invested in the project and that are working there, I have talked to people from different levels, from the waiter at the restaurant to people working with ECA. This was because I was extremely interesting in the project. (does the marketing reflect the reality) I haven't seen any public marketing of the city so I really can't answer that question. I was introduced to the possibility of attending an event at the project through a friend. I really no nothing about the city outside what I have seen and the people I have talked to. I think people need to be informed more. I do think they have started to put some good effort with the events and activities they are holding at the project, this is something that has started since last year and it one of the main things that has helped build an idea of the project and its potential. There are lots of services that if they provided them more people will be interested and happy with the project.

Interview 36 (ID36)**Professional, marketing, Saudi, Male**

I attended two events at the city, it was very far to just go for an event, that made me lazy going back. It's still empty, there isn't anything there worth visiting except the sea. I don't see any clear development progress to make someone believe that it will become something special. They are moving really slowly. One of the only things I feel that is good there is the port they just opened which could be a source of their main income. They say they want to expand the port and make it one of the biggest ports in the world. What I do see is that people are buying property there and then wait a bit and resale it when the prices have gone up a little. Nobody really wants to live there, similar to KAUST, nobody wants to live there, most of the people I know that used to live there have left. But that is mainly people working there, most of the students still live there. KAEC is worse, even the employees of EMAAR don't want to live there. I do see that there is industrial growth in the city and hear that lots of companies have committed to open there but not sure what they are doing there. But they are big names, I really don't see much progress, I wish it will turn out to be something important and big and is worth all the hype. In the beginning it fails and now they have changed their route, now they say everything is being based on demand and not future potential growth or what a city needs, they build a bit a see how well it is received, they are also building into the project a clear segregation of social classes, areas for the rich and for the factory workers, basically planned exclusion from day one and this is something I didn't like. Even they marketing reflects this. They are selling based on price not community, these aren't marketing people, they are employees. This is a reflection of what people believe. (elements) from the people I know there, mainly its just word of mouth, nothing really based on things that have been communicated to the public. A few months ago I was at a

business event and was sitting with a German national that used to work with EEC and a well-known Saudi businessman, their impression was that the project will fail. That the city will not reach the goals that have set, he bought up their decision making process, how they started with a hotel instead of more important community elements, the only advertising you see in the papers or in the streets is to sell apartments, houses and plots of land, and that isn't promoting the city, it is selling products. There is a bit on social media but not much. In general, they aren't communicating anything about the city or its progress, just selling real estate and investment opportunities. They need to change this focus to the city. They are trying to increase their PR via events in the city. One that comes to mind is an exhibition that was held there. I didn't go but saw a video and felt that the city was promoting a very strong exclusive western outlook. It gives the impression that we are not in Saudi and this might not be the general impression you want to give to the general public that is Saudi, like there is something wrong with how regular people in the country act or live.

Interview 37 (ID37)

Professional, Saudi, Male

I was invited to visit. The experience was great, except for the entrance where the staff were rude, inside the city it was really nice and very organized, one thing I noticed was everything closed by eight thirty, so there was nothing to do. If you don't know people there it will be very hard to have a social live. I do think the city has grown and shown positive change from a few years back. but its growing very slowly, the only thing new that stands out is the hotel. (elements) there is nothing. Nobody is announcing anything. If people are not making announcements that means, there is nothing new unless they want to keep it secret. Even the word of mouth that is going on is not because I hear people talking about it, its more because I am asking. I think they have done a very bad job at communicating what is happening. They could do a lot more. They can involve people, encourage people from outside the city to do articles and films, they should focus on people instead of just sales, The least thing they can do is open the gates to the public, because unless you are invited you are not allowed in.

Interview 38 (ID38)

Professional, international investor, Non-Saudi, Male

I see this as a business opportunity and not as a city project. I honestly do not care about the city, I don't care if they build the city or they don't build the city. What I care about, because I won't be living in the city as I'm top management, is that it is a great business decision. I want cheap labor, cheap energy, I want cheap land that I can build in a quick and efficient manner, a little bit of housing for my executive staff, or good transport that can bring them in from Jeddah, I want access to the Saudi and gulf markets. From our perspective it's a massive industrial estate, and that is all it is to us. If the rest comes good for them, if it doesn't come it won't effect me in any way, the majority of the people I will be hiring will be blue collar expat labor, jobs the Saudi's will never do so there is really no reason to care. I don't doubt the economic aspect of the city, what I do doubt is the city becoming a reality, but from what I have seen they have done little to develop a city. Not that they mean to be dishonest, its because they are learning as they are going, it's a hugely ambitious project. I just think that they took on too much without the experience to get it done and on a scale that is really risky. If I were doing the project I would have targeted smaller more attainable goals from a city perspective, a smaller town

that with planned growth to become a city. For a marketing perspective I don't think they did a good job promoting the city. But they did an excellent job making the case for a business opportunity, but even that has proved to be difficult. Promises are not being kept and regulations are constantly changing. If they continue to do that even business investors will lose trust in the city.

Interview 39 (ID39)

Community Figure, religious scholar, Saudi, Male

(impression of the project) the government has done an amazing job in developing opportunities for its citizens. The KAEC is one such project and will provide jobs and homes for our growing youth. I have complete trust in the King and the Saudi government that this project will succeed and benefit the country. The project is very large and has a port and a large industrial area. It also has housing and land that people can buy. (how have you built this impression?) through the advertising I have seen in the papers mainly and on the streets, I also hear about it a lot from friends and people I talk to and on social media. (do you think the project reflects Saudi society and religious values) As there is a great need for modern solutions for our urban problems. Existing cities like Jeddah are too crowded, too expensive, people need new options. I think KAEC is such a solution and a great initiative from the government. From another perspective I do feel that the city might be promoting a more mixed environment that isn't reflective of our cultural and religious values. While that could be a problem in the future, I have trust in the government and the people that that will not happen. The majority of the country is conservative in nature but that doesn't mean that they don't want to live in a modern city or society. The city could attract more interest by reflecting all levels and ideologies of the Saudi population on not just the rich or the less conservative. (Does the marketing reflect reality?) I think there is too much focus on sales and too little on people and their needs. They need to do more to educate people on the benefits of the city instead of targeting only the few people that have the money to invest there.

Interview 40 (ID40)

Academic, planning, Saudi, Male

From what I remember in the beginning there was a huge propaganda launch, there was so much information and reports that supported the concept, one of the main ones I remember is that the city will provide 500,000 jobs to Saudi's, it will be a complete city with all the needed services, they described the projects that will be included inside the city, they showed some great designs and an impressive masterplan for the city, it was something impressive in the beginning. But if you ask be about now, 2015, publicly the impression is that the project has failed, it hasn't worked, it doesn't include the basics to sustain life. It didn't attract people, we had a lot of nice talk but people don't know much further, they have failed in their implementation of the project. For example I initially thought that KAUST was a part of KAEC. I didn't know that they were two separate projects, from what was originally announced at the launch of the city, they said that they will be providing all services and facilities to the city including education. I don't see the reasoning for building a complete university outside the city where it could have been an anchor and driven growth. They I found out that the university wasn't even targeting Saudi's, it was for internationals with a completely western environment inside, like the gated communities that house westerners in Jeddah (stakeholders?) from what I know it's the government and that EMAAR is doing the construction. The primary people developing this project is the government, they are the ones that announced the project.

They promoted it as their initiative to build much needed new cities to the country. (explained that EMAAR is not in charge of the project) so that is why the focus has shifted from developing the country and providing jobs to selling apartments, villas and land. And I understand this shift in focus. Our citizens trust real estate. And we really don't have much else in Saudi. (Elements?) in the beginning it was mainly the newspapers. This then included billboards on the streets, people started talking, people from all levels and professions, the effort they placed in the beginning was really strong. Suddenly this effort disappeared completely. This possibly was due to problems the project ran in to about five years ago when the government gave them a loan. Lately this has changed again as I see the advertisements again but its mainly sales related. I know people who have bought property there but there are no services, no social fabric, that's why I feel that the project didn't succeed. (planning problems) I know the project has many components such as residential and business areas, a port and an industrial area as well as a hotel. But all this is fine if it was only set to be an industrial zone and not a complete city, they just haven't really focused on the people and their needs to encourage them to move there. You need a reason to move there, at this point in time that doesn't exist. Would I move there with nothing there and very few people? Maybe if enough businesses and factories opened there and enough people moved there to create a community I would be interested in moving there. But not as it stands now or in the new future. From another perspective, for a place that has very little development, prices are really high, almost Jeddah levels. (marketing reflects reality?) not at all. I feel they have failed to reach their initial goals and have shifted to because a real estate sales oriented project. If they don't start building the basic seeds of community, the project will never change or become a real city. People want something tangible. Something you can see and feel.

Appendix 4

Interview Descriptors

ID Number	Category	Interviewee Descriptors
Interview 10 (ID10)	Professional	Businesses Man, international investor, Non-Saudi, Male
Interview 11 (ID11)	Professional	Non-Saudi, Male
Interview 12 (ID12)	Academic	Design consultant, Saudi, Male
Interview 13 (ID13)	Academic	Design consultant, contractor, Saudi, Male
Interview 14 (ID14)	Professional	Businessman, contractor, Saudi Male
Interview 15 (ID15)	Professional	Businessman, real estate consultant, Non-Saudi, Male
Interview 16 (ID16)	Academic	Saudi, Male
Interview 17 (ID17)	Professional	Businessman, Saudi, Male
Interview 18 (ID18)	Professional	Businessman, Saudi, Male
Interview 19 (ID19)	Professional	Businessman, Real Estate, Saudi, Male
Interview 20 (ID20)	Professional	Businessman, Architect, Saudi, Male
Interview 21 (ID21)	Professional	Businessman, Real Estate, former Government, Saudi, Male
Interview 22 (ID22)	Professional	Businessman, Saudi, Male
Interview 23 (ID23)	Professional	Businessman, Saudi, Male
Interview 24 (ID24)	Professional	Businessman, Real Estate, Saudi, Male
Interview 25 (ID25)	Professional	Businessman, Saudi, Male
Interview 26 (ID26)	Professional	Businessman, Saudi, Male
Interview 27 (ID27)	Government	Ministry of Urban and Rural Affairs, Saudi, Male
Interview 28 (ID28)	Professional	HR, Saudi, Female
Interview 29-30 (ID29-30)	Professional	Entrepreneurs, interior design company, Non-Saudis, Female
Interview 31 (ID31)	Academic	Dean at KAU, Saudi, Female
Interview 32 (ID32)	Professional	Placement officer, Saudi, Female
Interview 33 (ID33)	Professional	HR, Saudi, Female
Interview 34 (ID34)	Academic	Saudi, Female
Interview 35 (ID35)	Professional	Businesswoman, Saudi, Female
Interview 36 (ID36)	Professional	Marketing, Saudi, Male
Interview 37 (ID37)	Professional	Contracting, Saudi, Male
Interview 38 (ID38)	Professional	International investor, Non-Saudi, Male
Interview 39 (ID39)	Community Figure	Religious scholar, Saudi, Male
Interview 40 (ID40)	Academic	Saudi, Male

Code Presence

	Global integration	Competition	Economic Development	Religion	History and Culture	Affordability	Atmosphere	Services	Exclusivity	Luxury/affluence	Social fabric	Social Development/ Quality of life	Modernization	Technology	Infrastructure	Physical components of the city	Urban Development	Development	International Image	Future	Trust	National Pride/Vision	Confusion with KAUST	City	Branding	Sentiment
Interview 40		1				1		1				1			1	1	1						1	1	1	
Interview 39				1	1							1	1	1	1	1	1	1		1	1	1	1		1	
Interview 38			1														1	1			1	1	1		1	
Interview 37			1				1		1		1	1				1	1							1	1	
Interview 36		1	1	1	1		1		1			1			1	1	1	1	1	1				1	1	
Interview 35						1	1	1				1				1	1		1		1			1	1	
Interview 34						1	1	1	1		1	1												1	1	
Interview 33						1	1	1	1	1		1					1				1			1	1	
Interview 32									1	1		1				1	1				1				1	
interview 31				1	1		1		1	1		1		1	1	1	1				1			1	1	
Interview 30					1	1	1				1	1					1						1	1	1	
interview 29																	1						1	1	1	
Interview 28						1	1					1	1				1	1	1			1	1		1	
Interview 27																	1		1				1	1		
Interview 26																1	1	1	1	1	1			1	1	
Interview 25																							1	1	1	
interview 24													1				1	1	1		1	1		1	1	
Interview 23			1				1															1	1	1		1
interview 22												1					1				1			1	1	
interview 21												1				1	1	1					1	1	1	
Interview 20					1				1			1				1	1				1			1	1	
Interview 19						1			1			1				1	1				1		1	1	1	
Interview 18				1								1				1	1				1		1	1	1	
Interview 17				1	1			1			1	1				1	1	1	1		1		1	1	1	
interview 16																	1		1					1	1	
Interview 15					1				1			1					1	1	1	1	1	1	1	1	1	
Interview 14				1							1	1					1	1	1					1	1	
Interview 13				1	1						1						1	1	1		1	1	1	1	1	
Interview 12				1					1			1	1				1							1	1	
Interview 11					1				1			1					1	1	1					1	1	
Interview 10						1	1	1	1	1	1	1				1	1	1	1	1	1			1	1	

Descriptors/Code Count

	Services	Exclusivity	Luxury/affluence	Social fabric	Social Development/ Quality of life	Modernization	Technology	Infrastructure	Physical components of the city	Urban Development	Development	International Image	Future	Trust	National Pride/Vision	Confusion with KAUST	City	Branding	Sentiment
Visit KAEC: No	2	4		4	26	3	1	5	13	21	2	1	17	4	9	8	34	20	
Visit KAEC: Yes	8	13	3	8	37		1	9	16	29	26	2	17	7	14	1	71	27	
Secondary Segment: Business	6	2		5	16			4	8	10	8		8	1	6	3	29	16	
Secondary Segment: Consultant	2	6	1	2	7		1	2	4	6	5		3			1	15	5	
Secondary Segment: Contractor				2	5				2	2	7		3	3	3		9	1	
Secondary Segment: Design Consultant		2		1	8				1	3			2		1	2	6	3	
Secondary Segment: Government																			
Secondary Segment: HR	1	2	1	1	4				1	4	3		1	1	1		2	2	
Secondary Segment: Investor										2	1			1	1		4	1	
Secondary Segment: Marketing		3	1		4			2	2	5		1	1				4	3	
Secondary Segment: Real Estate	1	2			13	1		5	9	14	4	2	11	1	9	3	34	16	
Primary Segment: Academic	2	4	1	2	17		1	4	5	9	3		5	3	4	2	22	4	
Primary Segment: Professional	8	11	2	9	36	1		6	19	32	24	2	22	3	15	5	70	35	
Primary Segment: Religious scholar		2		1	9	2	1	3	3	8		1	5	4	2		5	3	
Primary Segment: Government					1			1	2	1	1		2	1	2	2	8	5	
Nationality: International	3	7	1	2	11			1	4	11	8	1	3	1	4	2	29	9	
Nationality: Saudi	7	10	2	10	52	3	2	13	25	39	20	2	31	10	19	7	76	38	
Gender: Female	4	6	3	3	12		1	2	3	8	4		5	1	1	4	12	7	
Gender: Male	6	11			51	3	1	12	26	42	24	3	29	10	22	5	93	40	

	Communication focus	City identity and Image	Change of opinion over time	Temporal Dimension	Transparency	Accountability	Politics	Developer (EEC)	Government involvement	City Governance	Stakeholders (non-human)	Stakeholders (human)	Stakeholders	Globalization	Competition	Economic Development	Religion	History and Culture	Affordability	Atmosphere
Visit KAEC: No	16	3	5	7			5	3	12	4		2	8		1	1	5	7	2	3
Visit KAEC: Yes	18	5	12	23	6	8	8	16	8			3	6	2	4	1	5	2	5	1
Secondary Segment: Business	10	5	6	9		1		7	5	3		2	2		2	3	3	4	2	5
Secondary Segment: Consultant	3		1	5				4		1		1	1	2		1	1	2	1	2
Secondary Segment: Contractor				2	5	6	7	4	7	2						1		4	1	1
Secondary Segment: Design Consultant	3	1	1	2			2			1			4				1	4		
Secondary Segment: Government																				
Secondary Segment: HR		1	1	2						1			1						1	5
Secondary Segment: Investor					1	1		1								3				
Secondary Segment: Marketing				2						2					2	1	1	1		1

Secondary Segment: Real Estate		2	2	2	3	1		4	2		2	1 4	3	4			8	8	1	1 7
Primary Segment: Academic	2	2	8	2	1	1		6	1		2	1 1	3	1 1	5	5	9	3		6
Primary Segment: Professional	1 1	5	8	5	1 0	2	2	5	2		7	1 2	1 5	2	3	1	1 8	1 2	8	2 4
Primary Segment: Religious scholar	1		3	3	1	2		2			2	3					1			1
Primary Segment: Government								1	2		1	4	1				2	2		3
Nationality: International	3	1	3	2	6		2	2			1	6	5	1	1	1	4	5		4
Nationality: Saudi	1 1	6	1 6	8	6	5		1 2	5		1 1	2 4	1 4	1 2	7	5	2 6	1 2	8	3 0
Gender: Female	1 0	3	2	2				3	2		3	2	3				5	6	1	2
Gender: Male	4	4	1 7	8	1 2	5	2	1	3		9	2 8	1 6	1 3	8	6	2 5	1	7	3 2

	Investors	City	Sales	People	Communication Type	Billboards	Events	Newspapers	Personal Interest	Social Media	TV	Visit	Word of Mouth	Authenticity
Visit KAEC: No	14	3	19	12	6	9	6	14	8	9	8	3	18	18
Visit KAEC: Yes	34	9	42	11	11	8	8	12	12	7	1	17	9	28
Secondary Segment: Business	12	3	15	9	8	5	4	7	9	5	3	6	8	13
Secondary Segment: Consultant	7		7	2	2		2	2	1	1	1	4		5
Secondary Segment: Contractor	2		6					1	1			1	1	2
Secondary Segment: Design Consultant	4		3	1	1	3	2	3	2	2	2		5	5
Secondary Segment: Government														
Secondary Segment: HR	1		2		1	1	2	1	2	1		3	1	3
Secondary Segment: Investor	4		2											1
Secondary Segment: Marketing	4	1	6		1	2	3	2		2		2	2	3
Secondary Segment: Real Estate	14	8	19	9	4	5	1	9	5	4	3	4	9	13
Primary Segment: Academic	7	2	9	5	3	2	2	3	1	2	2	1	7	11
Primary Segment: Professional	38	8	43	14	14	9	9	17	17	12	7	18	18	32
Primary Segment: Religious scholar	2		5	2		3	3	3		2			2	2
Primary Segment: Government	1	2	4	2		3		3	2			1		1
Nationality: International	16	3	15	3	2	1	3	3	2	4	1	5	2	11
Nationality: Saudi	32	9	46	20	15	16	11	23	18	12	8	15	25	35
Gender: Female	5	1	7	3	3	1	6	1	6	4		7	7	9
Gender: Male	43	11	54	20	14	16	8	25	14	12	9	13	20	37

Code Application

	Services	Exclusivity	Luxury/affluence	Social fabric	Social Development/ Quality of life	Modernization	Technology	Infrastructure	Physical components of the city	Urban Development	Development	International Image	Future	Trust	National Pride Vision	Confusion with KAUST	City	Branding	Sentiment
Interview 40	1				4			1	2	6						1	7	1	
Interview 39				1	6	2	1	1	2	4			5	4	2		2		
Interview 38										2	1			1	1		4	1	
Interview 37		1		1	2				2	2							1	3	
Interview 36		2			3			2	1	4		1					3	3	
Interview 35	2				2			1	1		1		1				3	1	
Interview 34	1	1		1	1												1	1	
Interview 33	1	2	1		1					2			1				1	1	
Interview 32		1	1		1				1	1			1				1		
interview 31		2	1		2		1	1		1			2			1	3	1	
INterview 30				1	2					1						1	1	1	
interview 29										1						2	1	1	
Interview 28				1	3				1	2	3			1	1		1	1	
Interview 27									1		1					2	1	1	
Interview 26								2	1	2	4		2		1		1	2	
Interview 25															1		1	1	
interview 24						1		1	2	4		1	3		2		1	1	
Interview 23	1												2	1	2		7	2	
interview 22					1				1				1				1	1	
interview 21					1			1	1	1			2	1	2		7	4	
Interview 20		1			1				1	1			2				2	2	
Interview 19		1			3				1	2			5		2		5	7	
Interview 18					1				1	1			1		1	2	6	3	
Interview 17	2			2	7			1	2	4	3		1		1		7	1	
interview 16								2	2		1						2		
Interview 15		1			5					1	2	1	1		3		11	2	
Interview 14				2	2				1	1	5						3		
Interview 13					3				1	1	2		3	3	3		6	1	
Interview 12		1			7					1					1		3		
Interview 11		3			1				3	1	1						8	3	
Interview 10	2	1		2	4			1	1	4	4		1				4	1	
Totals	10	17	3	12	63	3	2	14	29	50	28	3	34	11	23	9	105	47	

City identity and Image
Change of opinion over time
Temporal Dimension
Transparency
Accountability
Politics
Developer (EEC)
Government involvement
City Governance
Stakeholders (non-human)
Stakeholders (human)
Stakeholders
Global integration
Competition
Economic Development
Religion
History and Culture
Affordability
Atmosphere

Interview 40		1				1		1			2					2	2		
Interview 39			2	2				2			3								
Interview 38					3						1		1	1					
Interview 37	1				1											1			
Interview 36	1		1	1	1	2					2					1			
Interview 35	1	2						1	1			2	2					3	
Interview 34	1																1		
Interview 33	2																		
Interview 32																1			
interview 31	1		1	1				1	1		1		1			2			
INterview 30	2		1	1															
interview 29										1							1		
Interview 28	3	1						1			1					2	1	1	
Interview 27								1	2		1	2							
Interview 26								1	1		2		1			5	2	4	
Interview 25																		1	
interview 24																1		1	
Interview 23					2	2					1	1		1		2			
interview 22											1	1	1						
interview 21											2	1				2	2		
Interview 20			1															1	
Interview 19		1			1											1	1		
Interview 18				1							1	1							
Interview 17			3	1								1				1			
interview 16											1	2	1	3		1			
Interview 15			2	2	2			2				6	1	1		1	3		
Interview 14	1										2	1	3	1	1				
Interview 13		1	4		1							6	1	6	5	5	2		
Interview 12			3	1				4				1		2			2		
Interview 11			1		1							1					1		
Interview 10	1	1										2					2	1	
Totals	14	7	19	10	12	5		14	5		12	30	19	13	8	6	30	17	8

	Communication focus	Investors	City	Sales	People	Communication Type	Billboards	Events	Newspapers	Personal Interest	Social Media	TV	Visit	Word of Mouth	Authenticity
Interview 40	5	1	2	2	3	1	1		1			1			3
Interview 39	1			1	2		1		1		1			1	1
Interview 38		4		2											1
Interview 37	2			1	1	1				1			1	1	2
Interview 36		2		4			2	3	2		1			1	1
Interview 35	1			1	2			1		2			1	1	1
Interview 34		1		1				1			1			2	1
Interview 33				1				2			1		1		
Interview 32		2	1	2		1					1		2	1	2
interview 31	1	1		1	1	1		1					1		
Interview 30								1		1				1	1

interview 29										1	1			1	1
Interview 28		1		1		1	1		1	2			2	1	3
Interview 27				1	1		1								
Interview 26	4	3	2	1	1	4				2	1		1	1	2
Interview 25						2			1	1	1	1			
interview 24	2	5		2	1				2	1	2		1	1	1
Interview 23	1	5	1	5	1		1		1	1	1		1		1
interview 22		1		1	1		1		1	1	1				1
interview 21	3	1	2	3	1		2		3	2			1		1
Interview 20	3	2		2		1	2	2	2	1		2		3	
Interview 19	5		1	4	1	1		1	1	1	1	1	1	3	3
Interview 18		1		3	2		2	1	3			2	1	1	1
Interview 17	2	1		2	1	1	1		1				1	1	3
interview 16		1		1		1			1	1		1		4	1
Interview 15	2	6	3	6	2	1	1		1		1		1	1	4
Interview 14		1		3					1	1			1	1	
Interview 13		1		3											2
Interview 12		2		1	1		1		1		1			1	4
Interview 11		3		3					2			1	1		2
Interview 10	2	3		3	1	1		1		1	1		2		3
Totals	34	48	12	61	23	17	17	14	26	20	16	9	20	27	46

Code Co-Occurrence

	Sentiment	Branding	City	Confusion with KAUST	National Pride/Vision	Trust	Future	International Image	Development	Urban Development	Physical components of the city	Infrastructure	Technology	Modernization	Social Development/ Quality of life	Social fabric	Luxury/affluence	Exclusivity	Services
Sentiment																			
Branding			20		4		4		1	4	1				5			1	
City		20		2	15	5	20	1	9	12	6	3	1		19	2		1	4
Confusion with KAUST			2						1	1	1				1				
National Pride/Vision		4	15			8	16	3	2	5				2	3				1
Trust			5		8		8		1	2				2	3	1			
Future		4	20		16	8		1	2	6	2	1	1	2	7	1			1
International Image			1		3		1		1										
Development		1	9	1	2	1	2	1		4	1	1			2	1		1	1
Urban Development		4	12	1	5	2	6		4		6	2	1	4	15	1	1		1
Physical components of the city		1	6	1			2		1	6		5			3				1
Infrastructure			3				1		1	2	5		1						1
Technology			1				1			1		1		1					
Modernization					2	2	2			4			1		1				
Social Development/ Quality of life		5	19	1	3	3	7		2	15	3			1		10		2	7
Social fabric			2			1	1		1	1					10				4
Luxury/affluence										1								2	
Exclusivity		1	1						1						2		2		
Services			4		1		1		1	1	1	1			7	4			
Atmosphere			3				2	1		2	1				9	5			3
Affordability			1				1				1				1				
History and Culture		2	5		1		2	1	1	3					12	2		1	
Religion			3				2	1		2					7	1			
Economic Development			6				2		1	4					3				
Competition			2				1			1	1	1							
Global integration																			
Stakeholders		1	4		1	1	1		1	1					3			1	
Stakeholders (human)		1	1																
Stakeholders (non-human)																			
City Governance		3	3						3	1									
Government involvement (SAGIA/ECA)		1	8		6	5	4			3				2	3				
Developer (EEC)		3	5			1			1						2			1	
Politics			2												1			1	
Accountability			1			1													
Transparency			1			1													
Temporal Dimension		2	4		3		1	2	3	5	2				3	1			

Change of opinion over time			2			1	1		2	3	1				1				
City identity and Image		2	1						2										
Communication focus		10	5						1	3	1	1			3				
Investors		4	14		1					4	2	2			2				
City		8	6		1		1		2		1	1			3				
Sales		13	12		1					5	3				6	1			
People		6	6		2	1	2			2	1	1			10				1
Communication Type		1	1		1						1	2			1				
Billboards		3									1								
Events		1	1				1	1				1	1		1			2	
Newspapers		4	1		1		1				1				1	1			
Personal Interest		1	3																
Social Media		2	1		1		1											1	
TV		1	1		1		1				1								
Visit		2	2		1		1			1									
Word of Mouth		1	1				1			1		1			1				
Authenticity		19	12		1		1	2	7	8					13	2		1	1
Totals		151	285	7	94	47	114	16	70	138	48	26	7	17	197	36	3	20	27

	Atmosphere	Affordability	History and Culture	Religion	Economic Development	Competition	Global integration	Stakeholders	Stakeholders (human)	Stakeholders (non-human)	City Governance	Government involvement	Developer (EEC)	Politics	Accountability	Transparency	Temporal Dimension	Change of opinion over time
Sentiment																		
Branding			2					1	1		3	1	3				2	
City	3	1	5	3	6	2		4	1		3	8	5	2	1	1	4	2
Confusion with KAUST																		
National Pride/Vision			1					1				6					3	
Trust								1				5	1		1	1		1
Future	2	1	2	2	2	1		1				4					1	1
International Image	1		1	1													2	
Development			1		1			1			3		1				3	2
Urban Development	2		3	2	4	1		1			1	3					5	3
Physical components of the city	1	1				1											2	1
Infrastructure						1												
Technology																		
Modernization												2						
Social Development/ Quality of life	9	1	12	7	3			3				3	2	1			3	1
Social fabric	5		2	1													1	
Luxury/affluence																		
Exclusivity			1					1					1	1				
Services	3																	
Atmosphere			3	3														

Affordability					1	1											1	1
History and Culture	3			9	1			2				1		3				
Religion	3		9					1				1		1				
Economic Development		1	1			3											2	1
Competition		1			3												1	
Global integration																		
Stakeholders			2	1				6			5	7	2	1				
Stakeholders (human)								6			4	5	2					
Stakeholders (non-human)																		
City Governance								5	4			5	5				2	
Government involvement			1	1				7	5		5		4	7	5	4	3	2
Developer (EEC)								2	2		5	4		1	2	2		1
Politics			3	1				1				7	1		6	5	1	
Accountability												5	2	6		6	1	
Transparency												4	2	5	6		1	
Temporal Dimension		1			2	1					2	3		1	1	1		6
Change of opinion over time		1			1							2	1				6	
City identity and Image								1			1						2	
Communication focus			1					3	1			1	1				5	2
Investors			2		5	1		1				2					1	2
City								2			1	1	1				2	1
Sales		3	2		4			1				2	3				2	3
People		2						3				2					2	3
Communication Type								1	1									
Billboards																		
Events	2		1	1														
Newspapers																		
Personal Interest																		
Social Media																		
TV																		
Visit																		
Word of Mouth																	1	
Authenticity	1		5	3	2			3			2	2	3				5	2
Totals	37	14	73	41	42	14		62	21		40	10 3	46	38	27	24	74	42

	City identity and Image	Communication focus	Investors	City	Sales	People	Communication Type	Billboards	Events	Newspapers	Personal Interest	Social Media	TV	Visit	Word of Mouth	Authenticity	Totals
Sentiment																	
Branding	2	10	4	8	13	6	1	3	1	4	1	2	1	2	1	19	151
City	1	5	14	6	12	6	1		1	1	3	1	1	2	1	12	285
Confusion with KAUST																	7

National Pride/Vision			1	1	1	2	1			1		1	1	1		1	94
Trust						1											47
Future				1		2			1	1		1	1	1	1	1	114
International Image									1							2	16
Development	2	1		2												7	70
Urban Development		3	4		5	2								1	1	8	138
Physical components of the city		1	2	1	3	1	1	1		1			1				48
Infrastructure		1	2	1		1	2		1						1		26
Technology									1								7
Modernization																	17
Social Development/ Quality of life		3	2	3	6	10	1		1	1					1	13	197
Social fabric					1					1						2	36
Luxury/affluence																	3
Exclusivity									2			1				1	20
Services						1										1	27
Atmosphere									2							1	37
Affordability					3	2											14
History and Culture		1	2		2				1							5	73
Religion									1							3	41
Economic Development			5		4											2	42
Competition			1														14
Global integration																	
Stakeholders	1	3	1	2	1	3	1									3	62
Stakeholders (human)		1					1										21
Stakeholders (non-human)																	
City Governance	1			1												2	40
Government involvement (SAGIA/ECA)		1	2	1	2	2										2	103
Developer (EEC)		1		1	3											3	46
Politics																	38
Accountability																	27
Transparency																	24
Temporal Dimension	2	5	1	2	2	2									1	5	74
Change of opinion over time		2	2	1	3	3										2	42
City identity and Image		5	1	1	1		1			1						2	24
Communication focus	5		7	7	13	7	7									6	111
Investors	1	7		3	33	5	1	2		2	1	1				2	125
City	1	7	3		5	5	2									1	64
Sales	1	13	33	5		10	2	6		7		1	1		1	3	169
People		7	5	5	10		3									8	97
Communication Type	1	7	1	2	2	3		1		2	2	1		2	1	1	42
Billboards			2		6		1			15	2	3	4	2	2		44
Events																2	15
Newspapers			2		7		2	15			2	4	7	2	3		58
Personal Interest	1		1				2	2		2			1	2	4		23
Social Media			1		1		1	3		4			1	1	2	1	25

TV					1			4		7	1	1			1		21
Visit							2	2		2	2	1			1		19
Word of Mouth					1		1	2		3	4	2	1	1		1	26
Authenticity	2	6	2	1	3	8	1		2			1			1		146
Totals	24	11 1	12 5	64	16 9	97	42	44	15	58	23	25	21	19	26	14 6	

Code Weight Statistics

	Count	Min	Max	Mean
Sentiment				
Branding	47	1	5	3.3
City	105	1	8	4.4
Confusion with KAUST	9	5	5	5
National Pride/Vision	23	5	5	5
Trust	11	2	5	4.7
Future	34	5	5	5
International Image	3	5	5	5
Development	28	2	5	4.9
Urban Development	50	2	5	4.9
Physical components of the city	29	5	5	5
Infrastructure	14	5	5	5
Technology	2	5	5	5
Modernization	3	5	5	5
Social Development/ Quality of life	63	2	5	4.8
Social fabric	12	5	5	5
Luxury/affluence	3	5	5	5
Exclusivity	17	5	5	5
Services	10	5	5	5
Atmosphere	14	5	5	5
Affordability	7	5	5	5
History and Culture	19	5	5	5
Religion	10	5	5	5
Economic Development	12	5	5	5
Competition	5	5	5	5
Globalization	2	5	5	5
Stakeholders	14	5	5	5
Stakeholders (human)	5	5	5	5
Stakeholders (non-human)				
City Governance	12	5	5	5
Government involvement	30	5	5	5
Developer (EEC)	19	2	5	4.8
Politics	13	5	5	5
Accountability	8	5	5	5
Transparency	6	5	5	5
Temporal Dimension	30	2	5	4.9
Change of opinion over time	17	5	5	5
City identity and Image	8	2	5	4.6
Communication focus	34	2	5	4.9
Investors	48	5	5	5
City	12	5	5	5
Sales	61	5	5	5
People	23	2	5	4.9
Communication Type	17	5	5	5
Billboards	17	5	5	5
Events	14	5	5	5
Newspapers	26	5	5	5
Personal Interest	20	2	5	4.6
Social Media	16	5	5	5
TV	9	5	5	5
Visit	20	5	5	5
Word of Mouth	27	5	5	5
Authenticity	46	2	5	4.7

Appendix 5

Focus Group Testing Transcription

18/4/2016

FGP denotes 'Focus Group Participant' number, text between brackets are excerpts and comments by the researcher leading the focus group to put their statements in context.

(Introduction to the focus group)

(As you are listening, if something comes up that you find as interesting, let's talk about it, maybe it's something that didn't cross my mind, things that I missed in the literature, didn't come out of the interviews, or something that is happening locally, you might have a better idea as you are a part of this market and have exposure to many of the development projects that are happening in the country)

(How many of you have visited KAEC, the case study for this project?)

FGP1: I've don't some consulting on the project so visited it then.

FGP2: I've worked there for eight months.

FGP3: I've went for site visits and project visits and things like that.

FGP4: I haven't had the chance to visit the city.

(While it is not essential for participants to have visited the project, for those of you that have not visited, or visited it a few years back I have some interesting information and photos that will give you a good idea of what is happening there. What I am going to talk about is a bit of background on the project, I will also give you a bit of background on the phases of the Phd, step by step of what I have done, just really quickly, to get you to a point where I can show you some analysis and findings, and the adjustment of the conceptual framework that I have developed for the study.)

(start of presentation on the study)

(When talking about new cities around the world and some of the success stories and failures)

FGP2: but Brasilia for example have a successful example of a new city starting from scratch.

While Brasilia is a good example, there are others that have also shown success.

(We are trying to understand what makes a new city project succeed and to identify what are the reasons why others have failed. We need to pinpoint what are the seeds that have been placed to achieve this success. Why have they succeeded and why have others failed?)

FGP4: there might be a question before we start, how do you come up with a clear definition on what a city is? What makes a city a city? Or a global city?

FGP2: you mentioned global cities, is it the architecture? Will some of the cities in places like Kazajistan ever be global cities?

FGP4: and what are the factors that make a city? Is it population, economics?

(I think it is a mix of everything. Right now most people identify a city by size and population. But its more than that. It's the linkage to national, regional, and global networks and markets. To government and business mainly. For my study we are not specifically looking at global cities, though some new cities around the world have that as a goal. KAEC for example was pegged to link to these markets. While this was a goal

for the city in the future through the port and as a logistics hub, that doesn't look like it is happening on the scale they envisioned. Now they are mainly targeting, housing, and building a large industrial estate, FDIE, and business. Basically to diversify the economy) **FGP3:** that leads me to the question I had which was how many of these cities were based on ideas and how many of these cities were based on economic concepts? Because I think these are the two main drivers or forces. A lot of the new cities are following constructs such as knowledge cities, cities based on creating a hub. Or a new economic concept which for example is a port city, we are going to create a port here, this port is going to be the best and will cover all of this region. So it is either an economic base model or an idea model, and then they will facilitate and provide wonderful environments to attract. I'm reading up a bit about these new cities, I have an interest in them, basically they are saying cities are in competition to bring in "knowledge capital" people are considered capital, basically how are they going to attract us, these I think are the main, or one of the main things possibly, I don't know really.

(you are right, if you go back to the main theories we talked about, globalization, all it talks about is that. Its attracting people, money, capital, events activities, tourists, everything to a city and that gives it competitive advantage over other cities. It makes people want to invest so the city grows more and it is an ongoing cycle. You're right, attracting this sort of capital is globalization. In terms of the designations of cities, creative city, economic city, it was a trend, is a bit less now, 10-15 years ago this was one of the main trends in city development, everyone started to announce their focus on specializing on a city scale. Cultural cities, but this was mainly for existing cities in an attempt to create competitive advantage. But many new city developers took this trend and started to implement it to their projects such as technology cities or economic cities) **FGP3:** It would be interesting to see from all the new cities, which one follows which ideas or **concepts. And find out which are more likely to succeed.**

FGP4: or what triggers the creation of new cities. When do I construct a new city?

FGP1: that was my question. What motivates the creation of these different new global cities.

(the goal is to be globally competitive in the future. It's going to take time. In terms of naming these cities in terms of specialization, a city isn't just one thing, you could have districts in the city that are creative, right now the trend is moving towards smart cities. Unified for all cities. Putting into place technology, that makes the city more successful, sustainable, green, things like urban and infrastructure management systems)

FGP4: what makes a smart city even smarter is the shift to more human cities, I find this more interesting, as when you see the different from a technological, gadget, driven smart city, and a smart city that gives you the feeling that you are aware or conscious in a certain way as a human being. Which is something we miss in our existing cities today.

FGP3: when we look urban spaces, never before you've had so much access to big data in an urban space. Instant access. And that is changing how people not only perceive but use spaces as well.

FGP4: smart cities could be a reason to develop a city from a smart point of view. Or a planning point of view. Where you can rethink the city from a smart technology perspective.

(the new cities that are being developed are based on historic principles of urban design, in terms of walkable cities, in terms of density, in terms of mixed use where everything is around you. Building these hubs, prefabrication, there is so much happen but it is still very new. And of course there will be a lot of trial and error in these kinds of developments. But for every innovator that is trying to develop and use new technology

you have many developers that are trying to build and sell houses. Especially in place like the middle east.

(Saudi promoted their new cities based on the Singapore's technology driven model. They initially started with a strong push for technology use such as the hologram presentation done for the king. They were promoted to be incredible cities of the future. But the reality is that they are just selling land and houses)

FGP2: this brings us back to the issue of cities. Most of the time is is economically linked. Even the names of the global cities that were mentioned like New York, London, Shanghai, they are economically based. If we look at Germany for example, the first city that comes to mind is Frankfurt, which is ridiculous. It's an industrial city. It's not a city that I want to live in. but people know it because it is a centre of science, a centre of economy, a centre of military.

FGP4: yes and no.

(but look at Dubai, right now Dubai is considered a global city. Why? Yes, so many companies are based there, it has become a centre of power. It's not just from an economic perspective, it's different kinds if power. One of them is economic but there are other things there as well. If I can get enough companies to base from there, that place becomes a catalyst for business, because as companies open there, the services come. The human capital comes, everything will be attracted to it. And it will eventually turn into something)

FGP2: but that didn't happen until they encouraged these companies to come.

FGP3: but Dubai is a mix

FGP2: But the initial trigger was the strategy that was put into place to attract these businesses.

FGP4: I think the most interesting thing about Germany is the country's global city isn't Frankfurt. Dubai is basically a city State, Dubai can function without its country. This makes it a global hub. But look at Germany, you have Frankfurt as the main transportation hub, and it's the main banking city, the Germans call it "Bankfurt". Then you have the industry in the south, Munich and Stuttgart. Export in Hamburg, culture in Berlin, and this makes the whole country more balanced from a globalization perspective.

(a gentle push to get back to the presentation then apologies and laughter as they realize they have gone deeply off topic)

(intro to study background from globalization to urban development to place branding)

FGP4: Are you looking at globalization critically? One of the things I am interested in is the Swiss approach to globalization. They have their own kind of understanding of globalization, yes we are part of it but we are still keep our territory.

(I still think that it is a type of globalization which is quite wide in its definitions. What I am looking at specifically is some of the reasons behind the development of new cities and how that is driven by various factors including globalization)

(place branding introduction: managing competitive identity, branding in existing cities, branding in new cities, the goal of this study, intro to the research, the focus on the development of new cities and their place branding, actors, time, the concept of brand, the naming, the representation, the concept of what I perceive as a city, and how that helps the branding process and what is its relationship to development. The use of ANT on something like this, looking at the people that drive the development of the development and branding of new cities, can help you understand the branding in this specific situation as the group of influential actors is quite small and you can actually trace them, brief on the case study, implementation factors in Saudi).

(Talking about the port and the high speed rail that will constitute the land bridge and their potential as an anchor when they are completely finished)

FGP2: if they are ever finished. Have you met Fahad AlRashid (CEO of EEC)? (yes I've met him). Recently he has had a recent interview on CCN. (yes I've seen it) he placed himself in a couple of hard corners. They are very optimistic about the project. You get the feel that the project is amazing, it is so successful. We have done this and done that, and then you go there and you are surprised by how empty it is.

(Talking about the investment aspect of the city and the positive response from investors)

FGP1: but will this create a city? (no but they don't seem to care from an investment standpoint) (but we are not just looking at it from an investment perspective, but a city perspective. How do we encourage a person to go and live it this city with his family if there isn't any social life)

FGP4: but are these social seeds even existing in the cities we live in right now in Saudi?

FGP2: but it's really difficult, you see the advertisement for Talah Gardens (a KAEC residential project), this was completely my design. This is the project I worked on with them. during the period of eight to nine months that I worked for them I was going back and forth a lot and got to know many of the top management on the project such as Fahad. What the problem was there is they they... from my perspective, building the city can't be a complete private sector responsibility. because the private sector engines are always, supply and demand and economy. The history of cities always has raised the issue of what comes first, magnets or people? People or magnets? People want services, and services need people, so who comes first? The private sector will not open shops and schools and hospitals and wait for people to come later on. It doesn't work this way. When they first started, and Talah Gardens was my design, I told them that building a residential complex like that you will only sell plots, fine, the Saudis are the best most fantastic people when it comes to buying land. If you open a subdivision in the middle of nowhere people will come and by land. EEC unfortunately gauges their success on sales. But where are the people?

(I asked one of the EEC employees why he doesn't live there if the project was so great? He answered that his social relationships wouldn't allow him to. There were no proper services for his families)

FGP2: there is no life there.

(in ten years the the city has just been connected to the public electric grid, there are no public buildings there except the train station that is being built on the border of the city, but what is public perception? What have they taken from what they have built and done? You already done residential projects, offices, a port, and a hotel. Do they believe in the project? Do they think it successful? Failing?)

FGP4: You have to forgive them. Modern Jeddah has all the problems you are talking about now. There is no identity, no social life, or anything else. You also have to forgive them when they go and establish a new city and it has the same diseases. I think this link is quite interesting. (we talk about these problems, these urban challenges in the beginning. Yes, the problem is the same mistake that are happening in existing cities are being repeated in new cities. We found that they are not designing a city for the future but one that is based on the past that are full of problems. Things like polarization, dual cities, exclusivity exist in KAEC. You still can't visit the city without an invitation, they want to make it exclusive to a certain affluent level of society).

FGP2: to many people this is an advantage.

FGP1: I know someone like that, a retired university professor, he has an adopted girl, all the other kids are married and have left home. He's living a good life, a nice house in Alshati (a affluent neighbourhood in Jeddah). He left it and is now living in an apartment in KAEC because the exclusive atmosphere there and the international school. This shows the exclusivity factor that is happening.

(but this exclusivity is desired by only a certain segment of society. But the city will target all levels of society. It can't be a city for the rich or it would be a gated community)

FGP4: but it is a compound, it is a gated community.

(but that's not what they strive to achieve)

FGP3: I think your main issue here is, basically you are looking, lets flip the issue, how would you brand Saudi Arabia? Which I imagine would be very difficult, that is your problem, as you are looking at a very unique nation within the global sense, global concepts don't apply here. Everything is unique. We have our individuality in everything.

FGP2: can someone show me this individuality? So we can find a way to get rid of it! (laughter)

FGP3: I'm looking at the research itself. Someone can say, all this is in Saudi, and these global practices don't apply to it because everything is centrally controlled and governed (yes top down)

(brief about the case study with pictures, discussing the size of the city vs its limited urban form, the concept of build it and they will come such as in Dubai, but the Dubai model is more inclusive and open).

FGP3: Another thing that is not measured by the physical environment in Dubai is the unique expatriate loyalty to the city.

FGP4: I think we need to differentiate between the regular expats, the ones that are living an affluent lifestyle, and the labourers. The media is constantly highlighting the plight of labourers.

FGP3: but that is mostly Qatar

FGP1: the expats I think in relation to Dubai, there are two kinds of them, the more established ones that are living a moderate life, similar to the ones that left Aramco that have their social networks and clubs. And then there were the ones that were hit when Dubai crashed. They feel the loss of the time spent there. There is a sense of being cheated and many promise they will never go back unless they can afford the affluent lifestyle they had before.

FGP3: but he still wants to go back

FGP1: yes, but he has this bitter feeling towards his experience there. Like the people who left their cars at the airport and just left.

FGP3: but there were many people they weathered the storm of the economic meltdown, they stayed, they feel that it is their city even if they are not Emirates.

FGP4: but they don't have anywhere else to go.

FGP3: maybe this is going to be the norm of the future. All the global population is a refugee.

FGP1: there was this interview on this Indian guy. He decided to make an investment on real estate in India, committed himself, and lost his job in Dubai, and now has nowhere to go. So he had to settle with a lower paid job in Dubai because he had nowhere to go. So he is there not out of loyalty but out of necessity.

(taking about the initial launch and the after the bailout in terms of representation, peoples trust in the king and government, social element that believes because of this loyalty. The project is basically imaginary, but people believe something is there, this is branding. So how is this done, how can we keep it authentic and how is it maintained over time).

FGP2: do you know how many master plans do they have up to now? Four versions. And as far as I know, today they don't have an approved master plan. Basically the city hasn't been built and the master plan has been changed four times. But they don't call it a complete change but a review or an update.

FGP3: but that will actually qualify it as a Saudi city (Laughter), just like any other Saudi city.

FGP1: you know the the whole country is experiencing a shift in their identity. All the changes that people like Mohammed bin Salman and Adel Fagih are doing, how will that affect the KAEC project. What I expect, sometime in the future, that Saudi's reserves of oil will be sold.

FGP3: never in history on the scale of a city, a community or compound its ok, but a city, private sector 100% development? It has never happened
(as Fahad AlRashid says, the first publicly traded city in the world)

FGP3: really! So interesting!

(they are not even publicly trading the city, they are publicly trading EEC the developer which is a company.)

FGP4: but you know why this is? In the end all the people that are in charge of the development, who we call designers, they don't appreciate the terms they are using, or even understand them, the word city, even though they all visit European and American cities, cities that you feel that are real cities, and they live in them in luxury hotels and they don't really interact with those cities properly to understand the meaning of cities and only think that a city is glass facades, its an image, in the end they come, and don't know any better in terms of cities, and they don't understand those terms. In all simplicity they tell you, first 'something' city for example, Economic. Is there actually something called an economic city?

(yes the UN has a definition for it), really?

FGP3: my main problem with KAEC is that it is identified as an economic city without an economic base.

FGP2: that is why they have done the port and the industrial area. And just image that this was the third stage of the city. It should have been the first one.

FGP3: I remember in the US a long time ago, Ross Perot, the economy stupid, it's the basis of all human activity and human settlements, if you don't have an economic base you are not going to have and settlement. Then comes the services that serve people that are working, that are living in this location.

FGP2: they are now starting to go back and are using political governance, or the country, to force people to go there. They have forced the national commercial bank (one of the biggest banks in Saudi Arabia) and they have put pressure on Saudi airlines to base their IT headquarters there. They are trying to move 6000 employees there,

FGP3: why?

FGP2: again magnet or people.

FGP3: even if you move them there, and then when you turn it into a private company, the private company board with identify that the whole IT section should move to India anyway (laughter), but this is the reality of globalization isn't that right? The whole point of cities these days is to find the niche where you can be special, and really amplify it and make it yours and fly with it or otherwise you are doing to die.

(back to the presentation, discussion on the management of the brand from the KAEC perspective, their focus on sales and generic lifestyle images)

FGP3: and all of this is just one part of, all these images are quality of life. Generic quality of life.

FGP4: you are arguing that in the end what is happening there has nothing to do with branding, basically this is your final conclusion? That they are trying to or claim that they are branding their city while the end result doesn't look like it's going in that direction.
(yes one of the conclusions is that they are not actually putting much effort to brand the city, but the image is being created nevertheless) but they aren't interested in this,

FGP4: and here is the question, if you are building a city on this scale, it's not that important to them, it's not as important.

(I don't have a personal preference, if they want to do an industrial estate that is fine)

FGP4: they will tell you you are an academic and you like these kind of things.

FGP2: but it is a private sector project.

FGP3: the company has lots of debt

(but it's a public private partnership. The government supervises it)

FGP2: not completely true

(I know I know, I've talked to them (lots of talking and laughing). Government has said though they are officially in charge they don't have anything to do with the city in anything way except the governmental business regulations)

FGP4: they have taken exceptions from the start from all the governmental agencies that exist. This city especially does not follow any municipality law and have their own systems

(true, it is basically a private compound right now, again I don't think that is a problem if it was being promoted as a private compound. But if you are doing a city, I'm trying to figure out, using KAEC, as an example, as a case study, for other cities that actually want to do a city, what not to do is as important as what to do.)

(back to presentation, talked about the shift to sales, the bailout, discussion of methods and analysis)

FGP1: what drove this change, the main elements, from what you've told us, quick returns drove this?

(in a way yes, they do have financial issues)

FGP3: From the first day they announced it and the buzz of the launch, I was discussing the project with a few others and we had two main questions, what is the economic base and how are they going to pay for it.

FGP4: when they announced the development of the city? It was when the stock market was at 21,000 points (one of the high peaks of the Saudi stock market), after that the drop happened. And I expect that it was surprising to even the decision makers on a government level.

(yes there was a clear effect of the financial crash on Saudi, though not as strong as in other places, but it wasn't one thing that led to the bailout, many factors caused it)

FGP2: Honestly when I first started working with them on Talah Gardens, at the beginning of the shift, they were forced, they had no way out. It was always very close to bankruptcy. Even salaries weren't paid for months. It was that bad. If it wasn't for the bailout loan they received from the government, it would have been a disaster. But when someone is drowning they don't have the luxury of time to discuss all these of issues, I need money. I need to pay salaries, they reached this level, leave things like branding for later, let's eat first.

(lots of comments and laughter)

FGP1: so you do mention what triggered this shift from here to here?

(yes in a lot of detail)

(discussion of media analysis, the focus on word of mouth and social media, and its importance to Saudi)

FGP4: but they never tried to build an identity or brand for the city

(they did in the initial stages of the project),

FGP4: what was this identity? Just the high-rise buildings?

(no, the push wasn't just the visuals, the push was from a social perspective, new cities for our youth, jobs and affordable homes, the push from the King, was improving the quality of life for our citizens, especially our children. That was the initial push, and that was amazing, and people ate it all up. They were happy, they said that what we need, our cities and societies are a mess. But unfortunately this vision didn't last very long.)

FGP2: yes, the situation was very bad at the time and I quit because they squeezed the designs. The design was completely built on social interaction between people, that's where the name came from because it was a huge park, divided between the whole community and it linked everyone together, no they wanted maximum utilization of land, increase sellable land until I reached a point I was telling them you are repeating the same mistakes of Jeddah. People won't come if you end up with a box with setbacks. I would just rather live in Jeddah, why would I come to you? There was so much financial pressure. they were shooting themselves in the foot by removing the social aspects of the design.

FGP1: if you look at Yanbu and Jubail as smaller industrial cities, they are 30 years old and people are just started to feel they are a part of a community, the cities are well designed from a physical perspective but failed to put into place social seeds. but that has been slowly changing. They are starting to see Yanbu as a destination where adult children living outside Yanbu will come visit their parents, pioneer employees in Yanbu. The older generation slowly established a society there.

FGP2: Physically Yanbu was well designed with parks and services but it is empty of interaction in the beginning, if it was in Jeddah it would have been packed,

FGP3: but you are starting to see change. It is alive. The city now represents every level of society.

FGP2: what limited Yanbu was the commonality of backgrounds and jobs. It was industrial so everyone was quite similar in patterns. It lacked the vibrancy that comes from diversity. This is what changed there, now there are different types of people. There are colleges and training institutes, hospitals, mall, Even people retired there. It changes the dynamic of the city. KAEC needed to encourage this diversify, they should have put in a major hospital or a branch of KAU university and paid for it as an anchor for the city. (ANT analysis, stakeholder influence, convergence of message, the concept of a city)

FGP3: Jeddah suffers from this concept of city of words. The slogan of Jeddah's summer festival "Jeddah Gair" (Jeddah is different). You hear it and you say oh wow, what's going on?! I'm missing out! You go out into the street and there is nothing there. It is an amazing example. Jeddah has been able to brand that festival. And not too badly. The words are much bigger than the actions.

(this is the foundation of what we are looking at in new city branding, words have to have strong affect as there is little action there, but it isn't enough to build a strong message, it has to be connected to something real, even if it is only planning, the authenticity needs to be there, things like the King's accreditation, by putting into place accountability and transparency).

FGP3: Yes, the authenticity is key.

(interview discussion, highlighting what stood out, speculative urbanism)

FGP1: I absolutely agree with the concept of speculative urbanism, but from my experience in the Bawabat Makkah development Project (Makkah Gate), I started the design process for the project, the idea to establish the administrative headquarters of the region in this project was sold to the government by a major real estate developer. The project started from there, not to provide a better environment or services for residents of Makkah. The real estate speculators started being the dominant force in the decision making process on the level of a city.

FGP3: you may not like it but the real estate speculators of yesterday are the Mayors of the future (laughter)

FGP4: not just that, they are the designers of these projects and cities. They dictate what is happening based on their own goals and objectives which are mostly financial.

FGP1: there is another factor in this situation, as mentioned before, KAEC was launched when the stock market was at its peak. Usually in Saudi when the stock market is up, land prices go down and vice versa. So was it wise of them when the stock market fell, they shifted to real estate.

FGP4: they went back to real estate. As that is the industry they understand.

FGP3: the impressive thing is that the region has a future but however, you can not interfere with market forces, it's like the push to have Saudi airlines IT moved to the city, a company knows its business, let the market decide, you just build what you think is right and you provide services for me,

FGP4: but it failed, put yourself in their shoes, what can you do?

FGP1: Riyadh proved the possibility, right?

FGP3: on a political level they pulled all the headquarters to there from Jeddah and are slowly killing the west coast region. Let the market dictate. Why do you need the bank headquarters to be in Riyadh? Let the bank decide.

(We always say that economics is the driving force, many influential economic writers have commented on the region and have found that it is politics not economics that drive the decision making process in areas in the developing world such as the middle east.)

FGP3: Of course, that is so true. And if economics is aligned with politics then fine.

(why would the government allow companies such as Sumu (Makkah Gate) or EEC (KAEC) to take the vision of the King and turn it into something sales related?)

FGP2: in that time, the prevalent impression was that public bodies were inept, weren't efficient enough to tackle these projects, during this period if you noticed, everything was shifted to ARAMCO (The Saudi Oil company). ARAMCO was building dams, ARAMCO was building roads, stadiums, universities such as KAUST, ARAMCO has become Binladin (the biggest construction company in Saudi). I have relatives that are high ranking employees as ARAMCO, when I talk to them it seems like the only way for the country to survive is ARAMCO. It is like if you had one good student' you give him all the work until he dies.

FGP3: the story of ARAMCO or Sumu, it always comes down to trust, they invest their trust wholly into individuals who are ordered to carry out. This is the tribal mentality of management,

FGP4: of family management), it's a family operated business.

(look at any history on the Kingdom, and you find that in the beginning of the reign of any of our kings, there is an amazing amount of payoffs.)

FGP4: Image formation for the reign. Yes, the King had a sincere goal for the KAEC project, but behind the king were many people that needed to be paid off by providing them with opportunities to be loyal.

FGP3: at the end of the day with new regime comes new people and these people understand that they are here for this regime and we have to do as much as we can before its done.

FGP3: regarding why people consider KAEC a city, this is where a non-professional is using professional terms, a city is a professional term, but he is an average layman, if you show him a district and tell him it's a city he will say ok. And he will believe in it and defend it.

(absolutely)

FGP3: Image carries power. Belief carries power, that means if used properly it has much value.

(recap and closing the focus group)

